YouWinLaw™

Manual

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YouWinLaw is developed by WinYou Law Inc. We are a software engineering company that has focused exclusively on the development of YouWinLaw. YouWinLaw is programmed with Microsoft Visual C++ (same as Word and Excel) and uses Microsoft SQL Server 2008 / 2012 as a real client server database (the Personal and Workgroup Edition uses the flat Microsoft Access database format). YouWinLaw runs on Windows 7 / Windows 8 and supports Word 2010 / 2013 and Outlook 2010 / 2013. The software is protected by copyright. WinYou is a registered trademark and protected accordingly. All other trademarks or product names are property of their respective owners. © 2013 WinYou Law Inc. All righs reserved.

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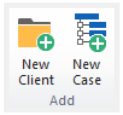

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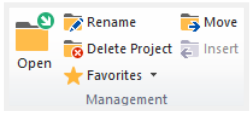

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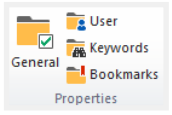

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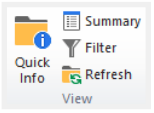

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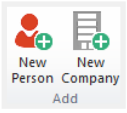

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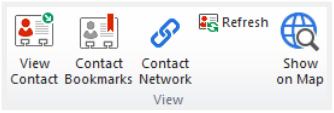

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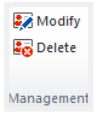

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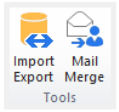

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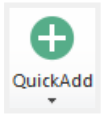

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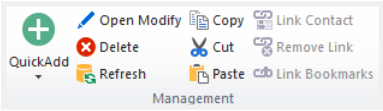

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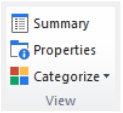

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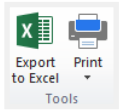

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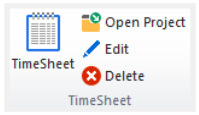

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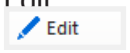

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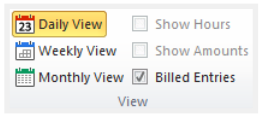

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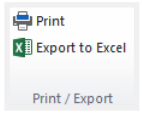

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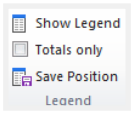

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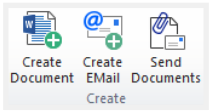

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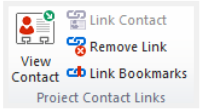

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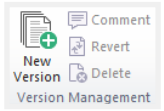

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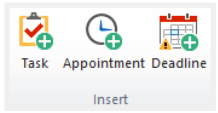

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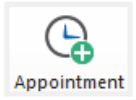

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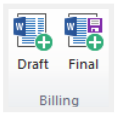

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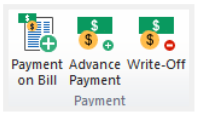

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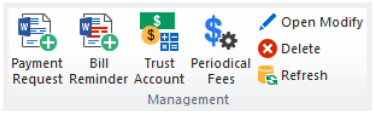

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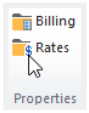

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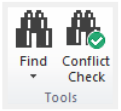

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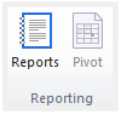

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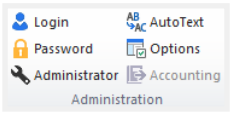

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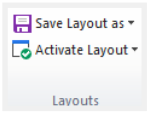

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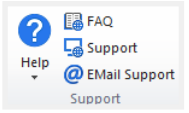

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What is where in YouWinLaw?

YouWinLaw has many views and can be customized in many ways.
This is our standard view with a white color scheme.

Quick Access Toolbar for YouWinLaw functions or commands
You can adjust the Toolbar yourself

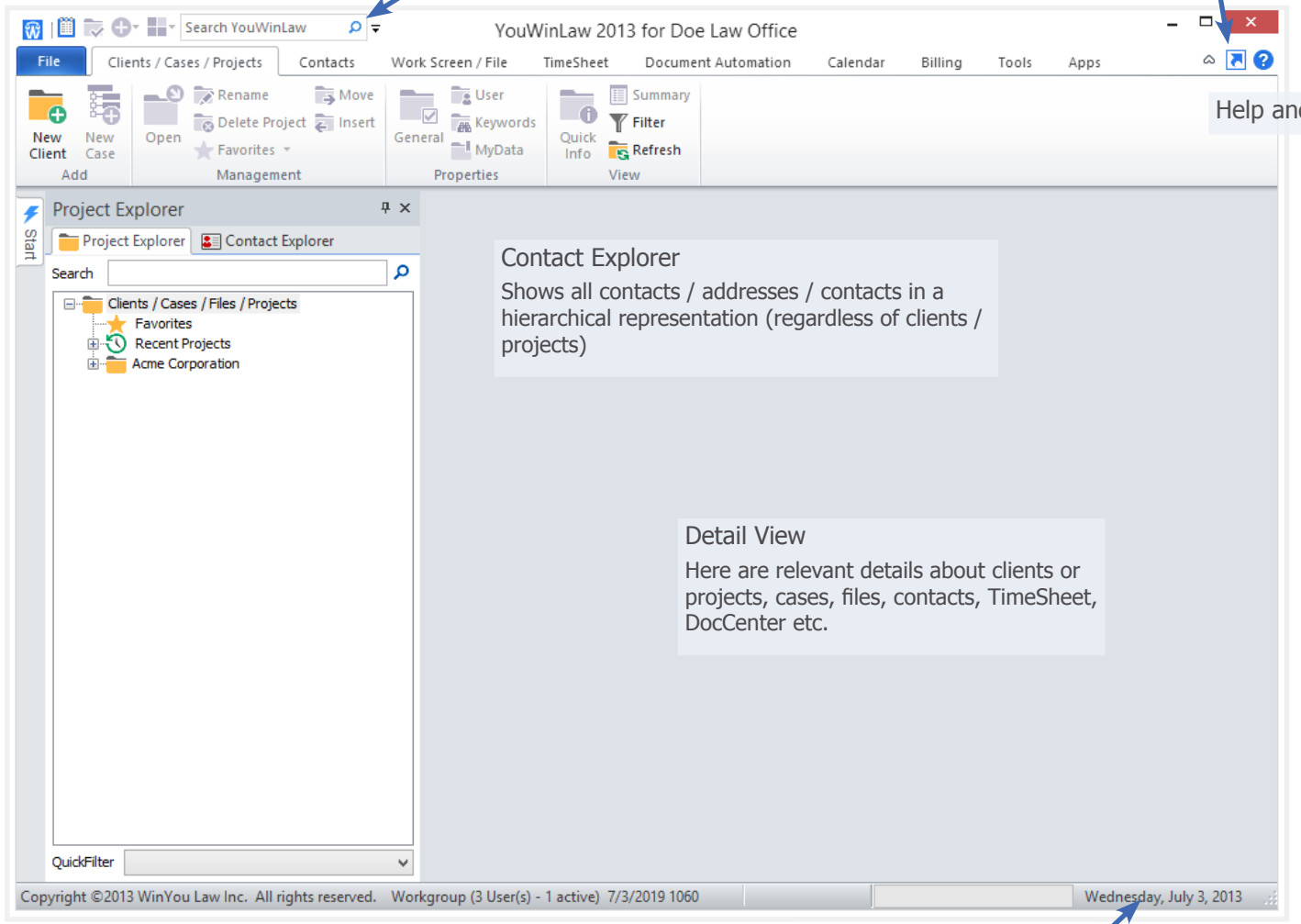
Quick Search

Fast switching to other programs such as Word, Excel, Outlook, etc.
You can adjust the menu yourself and add your favorite programs

Tabs
Same as the activities in a law firm

Ribbon
Contains all available functions and commands for the current tab (activity)

Project Explorer
Shows all clients / cases / files / projects in a hierarchical representation (unlimited levels)



Help and Support

Quick Activate Calendar

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Ribbon

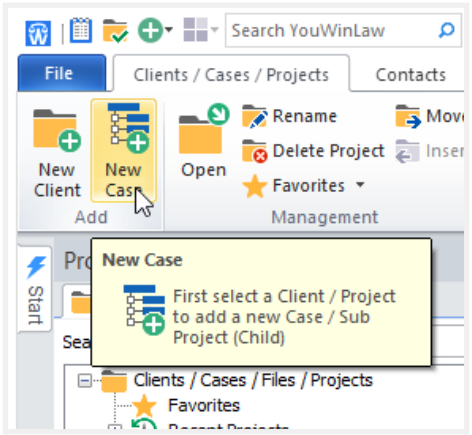
In YouWinLaw all commands and functions are here

The tabs are arranged according to the activities in a law firm:

- Clients / Cases / Files / Projects
- Contacts / Addresses
- Log / Journal
- TimeSheet
- Documents
- Calendar
- Billing / Payments
- Tools

Each tab includes a toolbar (toolbar buttons and text) which is grouped for an easy overview.

Each button includes a text and an icon, so you can easily recognize what it is. If you want more information about this button, you simply hold your mouse over it until a short help (tooltip) shows up:



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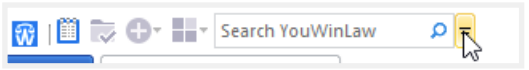
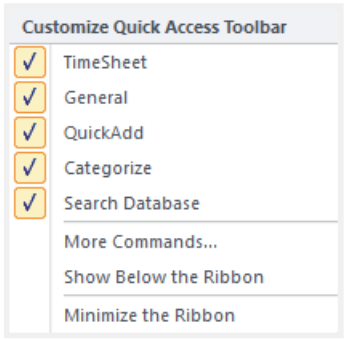
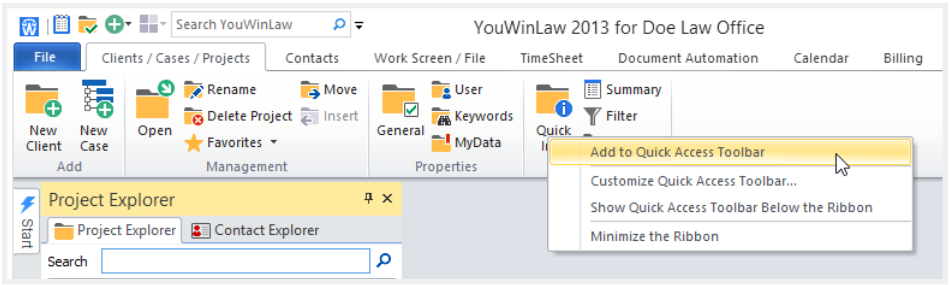
Quick Access Toolbar

These commands are always available, regardless of where you are in YouWinLaw. You can adjust the toolbar yourself.

To customize, click the small arrow (or left click on an icon to add):







Here you can switch the default commands on and off. The menu item "More Commands ..." opens the "Customize" dialog. With the tab "Quick Access" you can assign other commands.

You can also position the toolbar below the Ribbon.

Furthermore, you can minimize the whole Ribbon - for a small screen this certainly makes sense - (click on a tab and the ribbon will be visible again).

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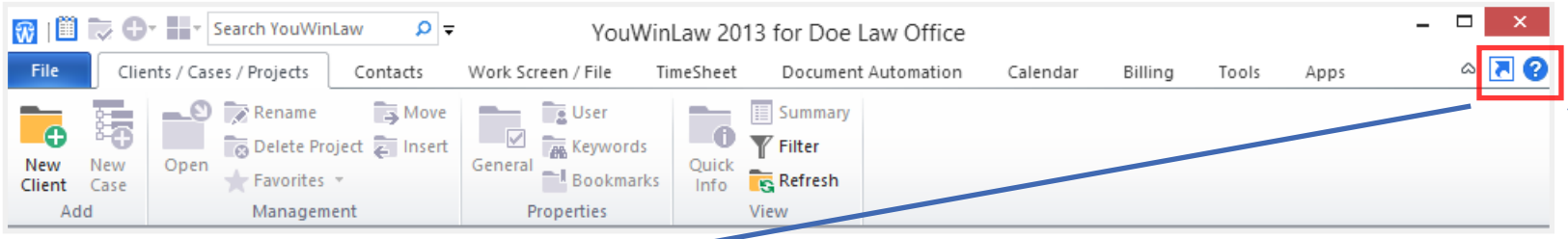
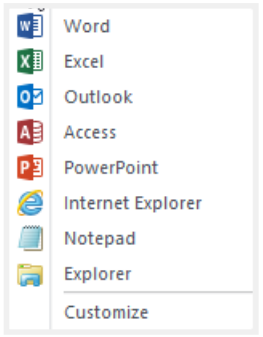
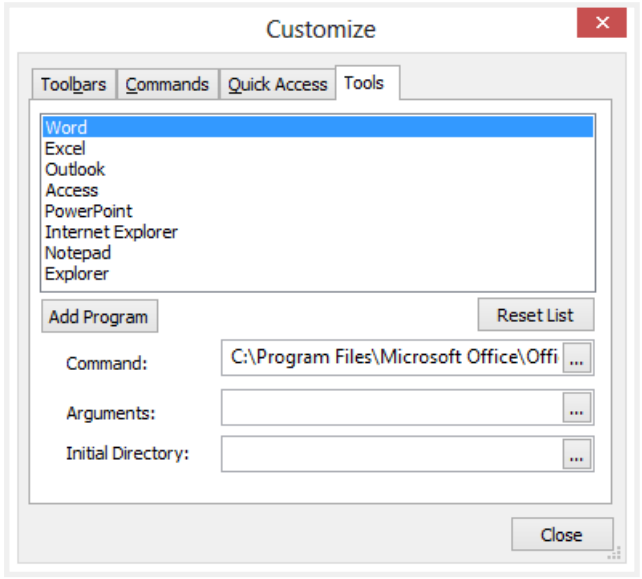
Fast Program Switching and Support

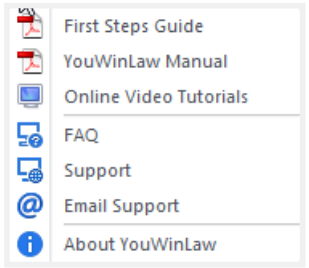
The two icons in the Ribbon (on the right) enable the quick change to other programs or the access to various help options.





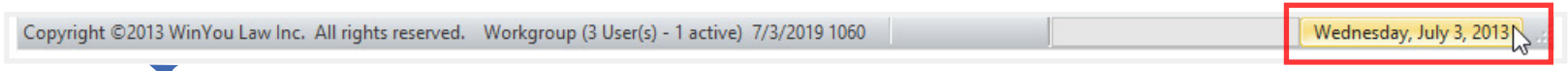
YouWinLaw searches automatically for the standard programs installed, you can add other software or links yourself.





The Help menu provides several links to help and tutorials.

Status Bar:



Link to YouWinLaw homepage

Button for direct access to the calendar

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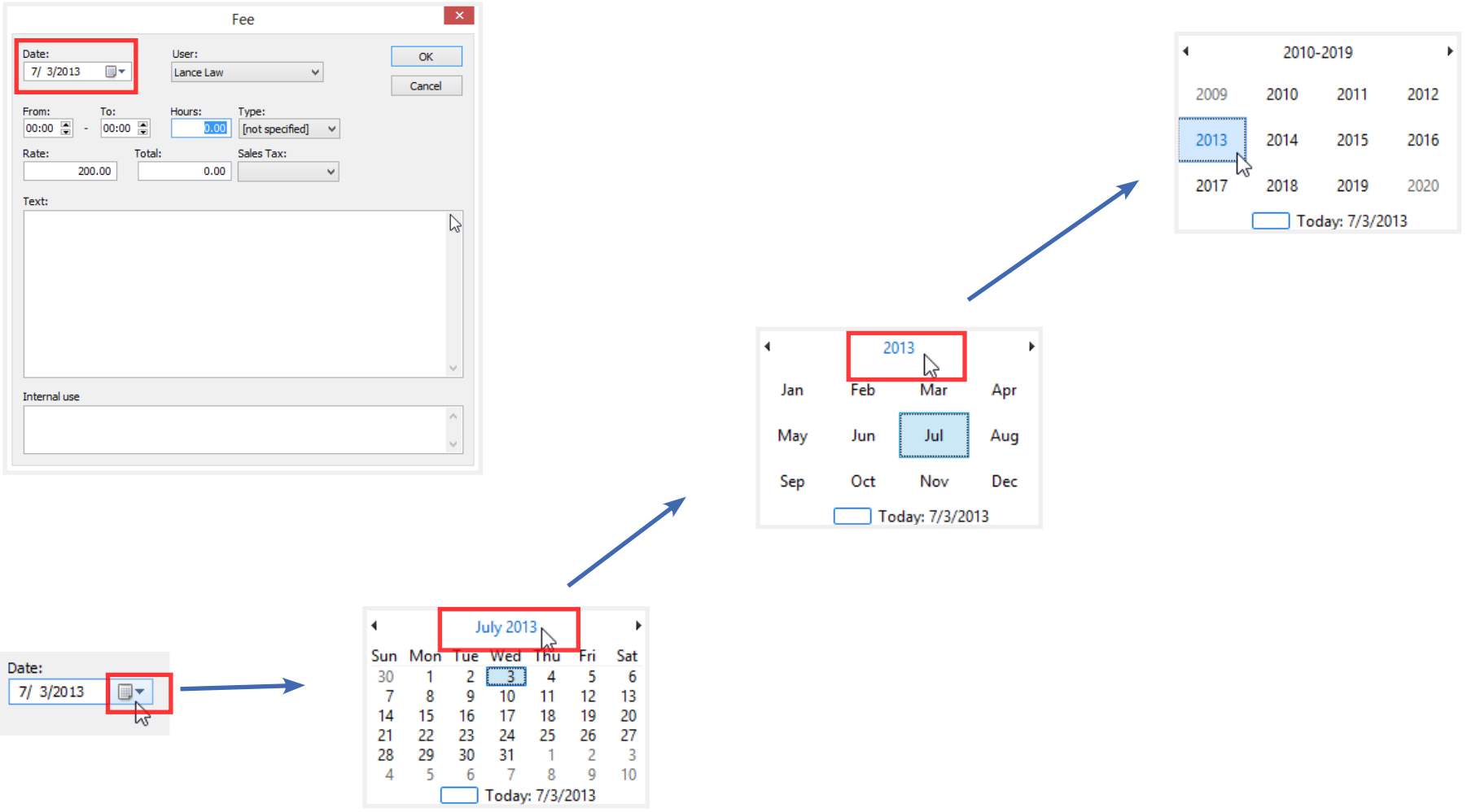
Date Fields in YouWinLaw

The date fields are modified by clicking on the day / month / year.
You can also change the date directly or use the arrows.



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Clients / Cases / Projects

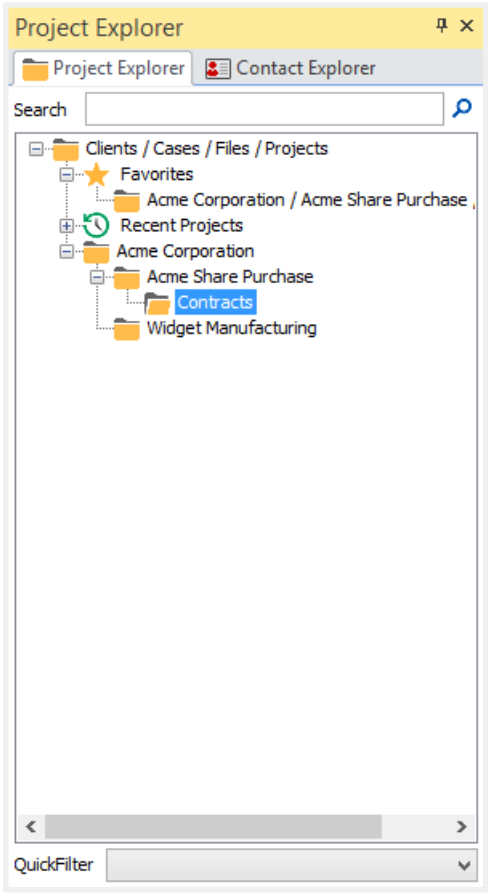
Management

This tab includes all commands and functions in relation to Clients / Cases / Files / Projects.

Project Explorer

The Clients / Cases / Files / Projects are organized in an explorer view (tree structure). The number of levels (hierarchy) is unlimited! Therefore you can for ex. organize your clients as the first level, then the cases or matters as the second level, if you have a lot of activities with a client, you possibly want to use further levels.

Projects with a [+] sign in front have subprojects. You can create as many hierarchies as you want. The projects or subprojects can be opened by double-clicking (clicking the [+] sign opens the project tree.)



Search in Project Explorer

To search in the list of projects, enter the first letters of the project name in the search field of the project list. If the desired project or subproject is available in your project list (filter!), then the entry is displayed, the cursor automatically jumps to the first entry. The F3 key selects the next matching entry.

You can also search directly for a project number: For example, search for project number 34, enter "#34". The corresponding entry is selected (assuming this is in the current project list and is not filtered).

YouWinLaw reads data very quickly and can display thousands of projects almost immediately in the selected view. For individual views you can create your personal, user related, project filter.

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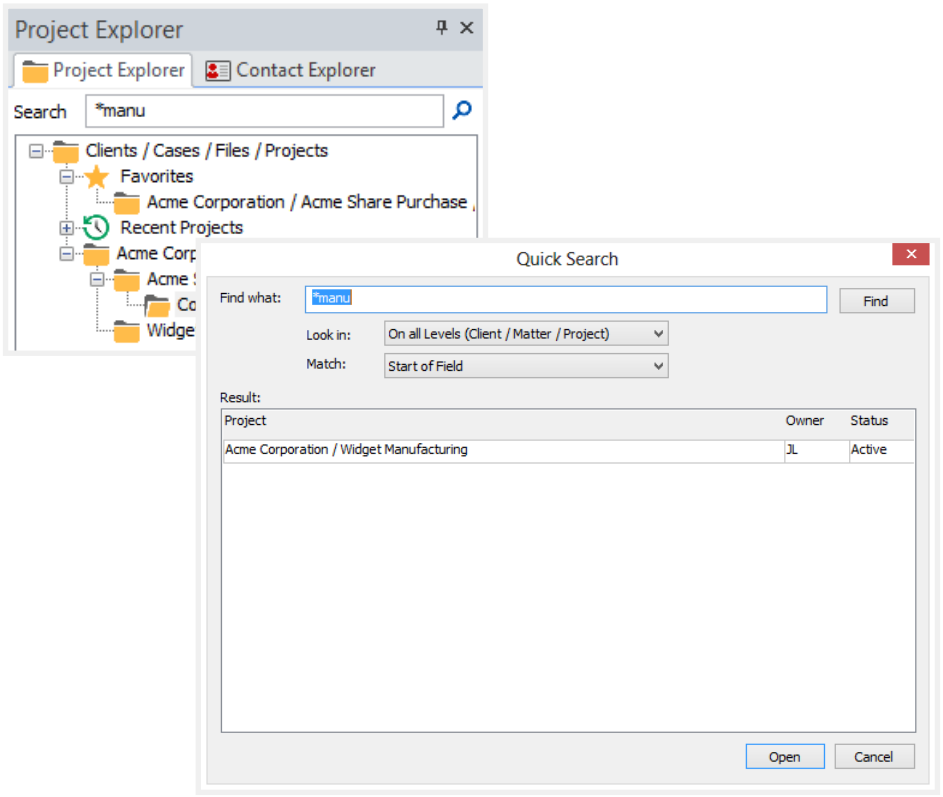
QuickSearch

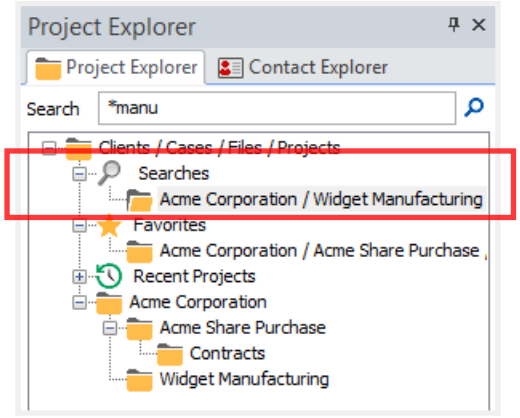
If you know only part of a name, you can also type this part "*manu" and then click the "Search" button or press the F4 key. Now the entire database is searched and the search results appear in the dialog "Quick Search".

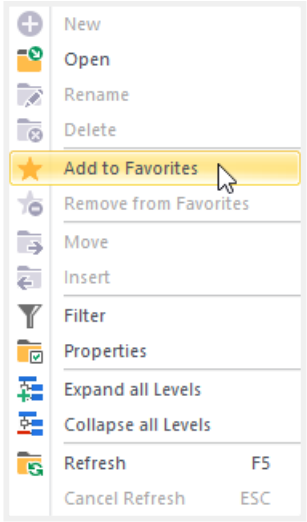
Select the desired project and click on the button "Open". This Project is shown in the list as "Searches", and can now be processed normally. The search projects will remain in the project list until refreshed or a restart of YouWinLaw.

You can assign a search project, to your favorites by selecting this in the project list and click on the button "Favorites".

Many commands are also available in the context menu of the Project Explorer (right click on a project).







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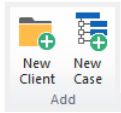
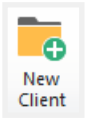


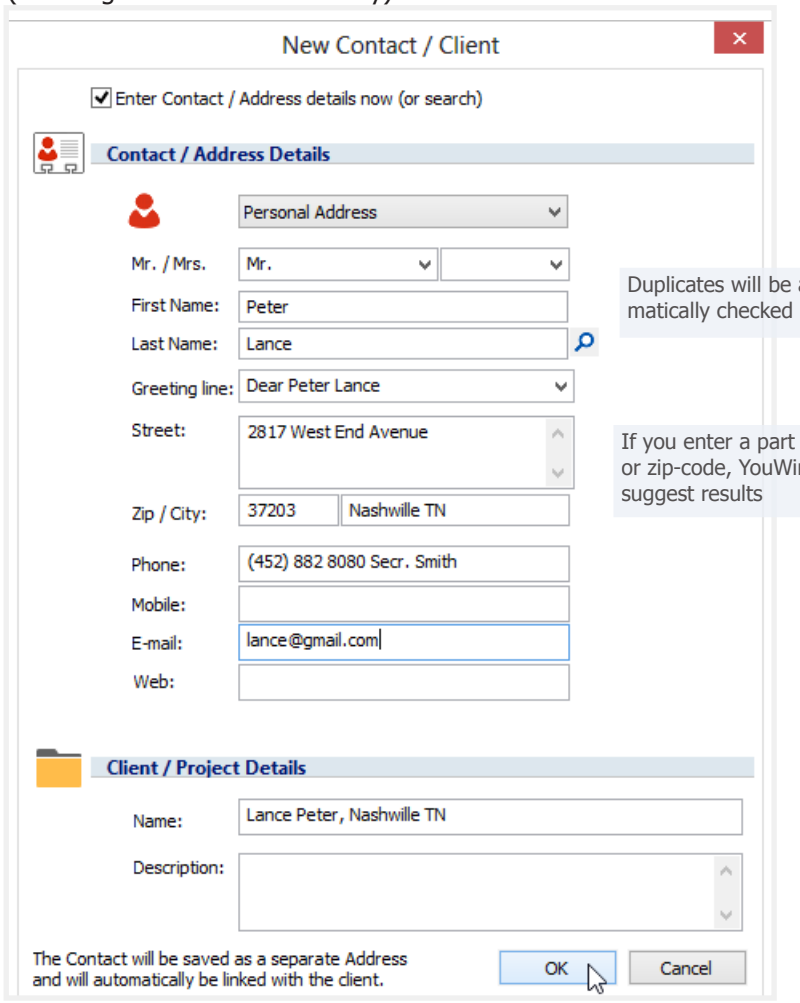
Add

Menu

New Client



A new client or project is created on the first hierarchy level: Enter the contact details and eventually change the client name (will be generated automatically) and close with the button «OK».

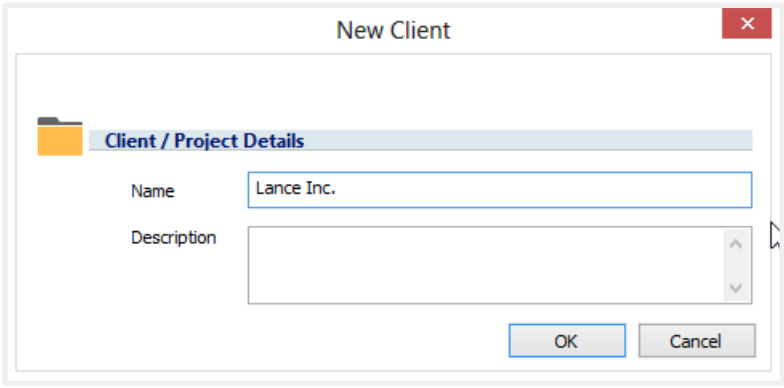


Duplicates will be automatically checked

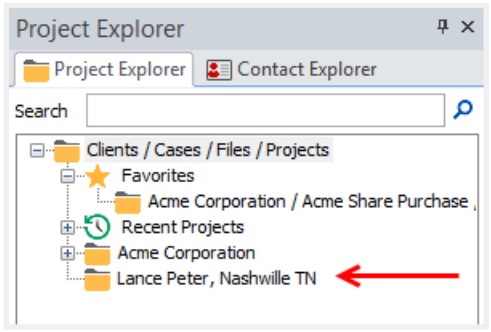
If you enter a part of a city or zip-code, YouWinLaw will suggest results

YouWinLaw will automatically create a new client, create a new contact / address and link the client with the corresponding contact address.

If you uncheck the "Enter Contact / Address detail", you can enter the Client directly (without any contact details). Normally you have then the contact details already in YouWinLaw contacts and will link them later.



The new project will be inserted alphabetically in the list of projects and opened.



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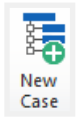
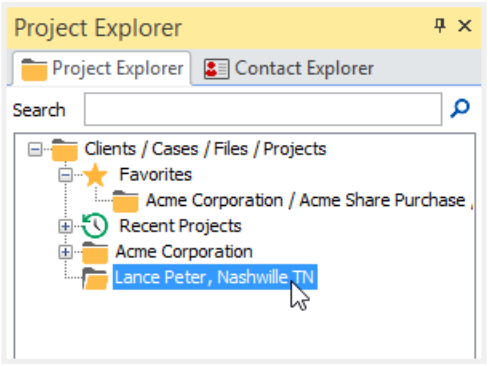
New Case

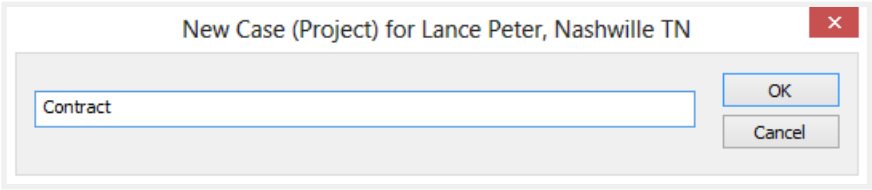


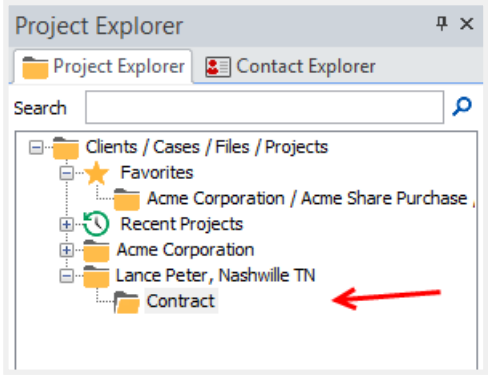
First select the client or the project (parent) in the Project Explorer.



Click on the button "New Case" and enter the name of the sub-project (child).

(In the dialog title, you see the name of the currently selected parent project). Click on "OK" to create the new sub-project. Many properties of the parent Client / Project will be auto-matically applied.





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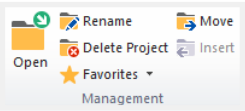
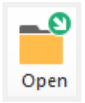


Management

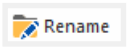
Open

Select the client / project which you want to open. You can also just open it by double-clicking the project name.



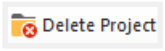
Rename

Rename selected Project.



Delete

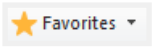
Delete a selected (highlighted) project in the Project Explorer.



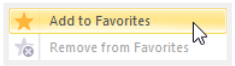
- All corresponding entries in the journal / log will be definitively deleted!
- All subprojects are also deleted!

Favorites

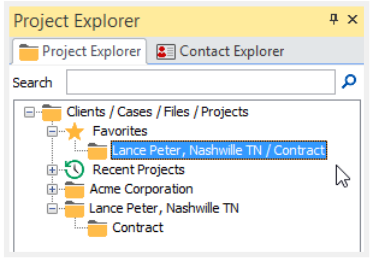
Select a project and click on the Favorites button. The project will be added to "Favorites" in the Project Explorer.



When you click the small arrow to the right of the button Favorites, a menu opens:



You can remove a selected project (in Favorites) from the Favorites list.



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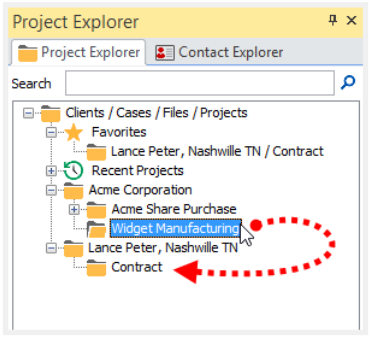
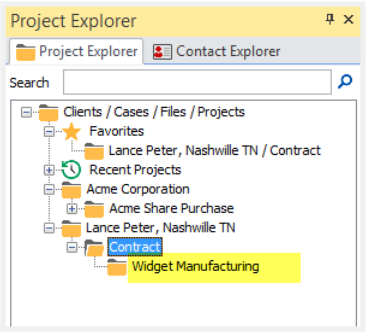
Move

1. Select the project you want to move
2. Click the "Move" button (the button "Paste" will be enabled)
3. Select the new target client or project
4. Click on the button "Insert". The project will be moved to the target.

Insert

TIP: You can also do this directly with DRAG & DROP!





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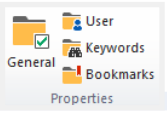
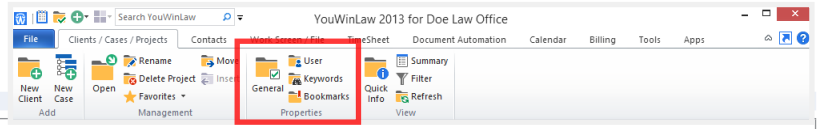


Properties



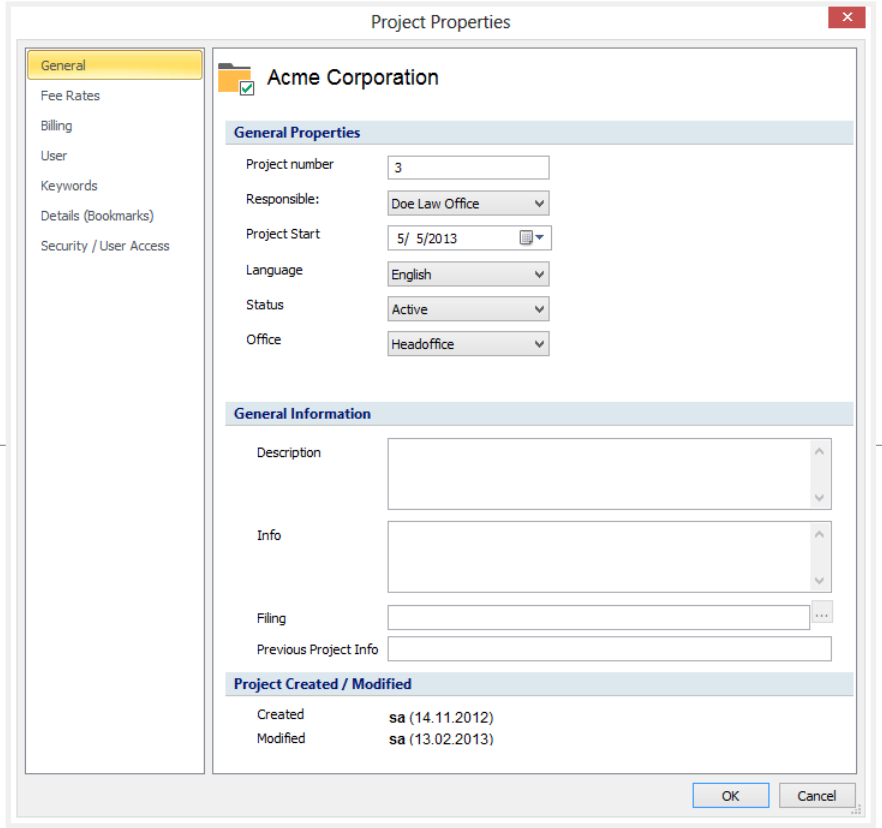
General

In the window "Details" you see all the project properties:

- Client/project number (cannot be modified)
- Location of the project
- Start of project (todays' date at opening)
- Responsible (e.g. responsible partner/case owner/project manager)
- Project language
- Status
- Description = Project description or information
- Filing = Filing place and / or filing number

Apply changes with the button "Apply"

Some of these information appears also in "Quick Info" see "Quick Info" on Page 22.



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User

User

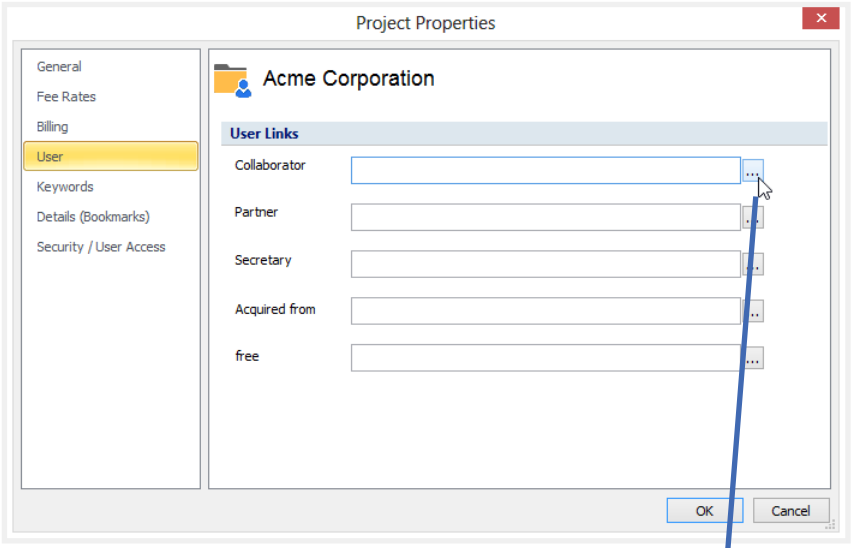
Registered users are allocated according to their functions in this project.

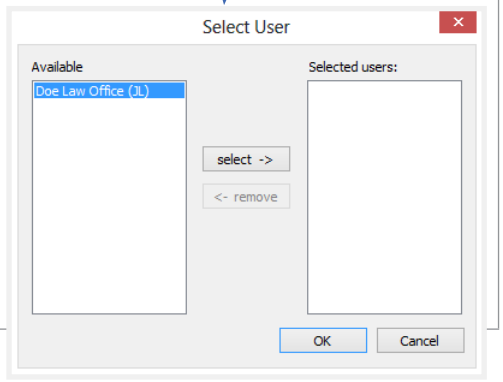
Assign Users:

1. Click on the button for selecting user [...] next to the field and the user selection window opens.
1. Select the desired user from the "available list" and click "select ->>" - the user is now added to the list of selected users. You can add as many users as you want.
2. Confirm with "OK" and "Apply".

Remove Users:

1. Click on the button for selecting user [...] next to the field and the user selection window opens.
1. Select the desired user from the "available list" and click "<<- remove" - the user is now removed from the list of selected users.
2. Confirm with "OK" and "Apply"..





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Keywords

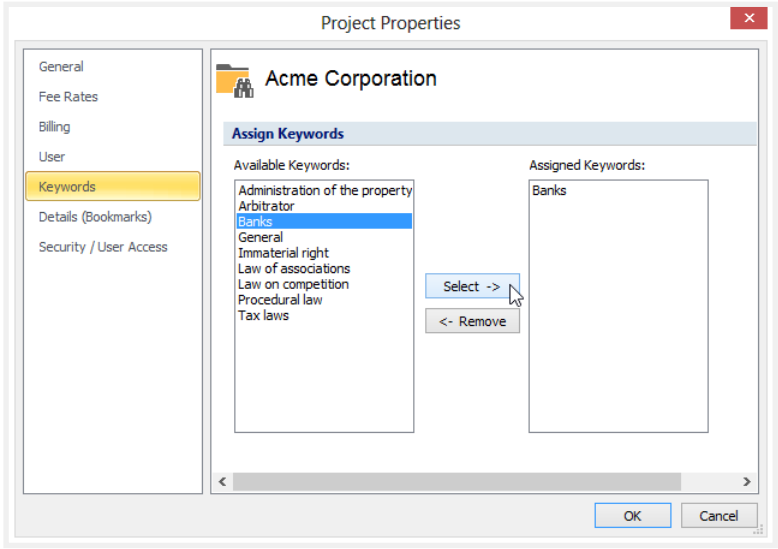
Keywords

Assign Keywords:

Here you will see the keywords which are assigned to the selected project. Proceed as follows:

1. Select the desired keyword from the list of existing codes
2. Click on "select ->>"
3. The keyword will appear in the list of assigned codes.

The selected keyword is now assigned.



Remove Keywords:

1. Select the keyword from the list of assigned codes
2. Click on «<<- remove».
3. The keyword will be removed in the list of assigned codes.

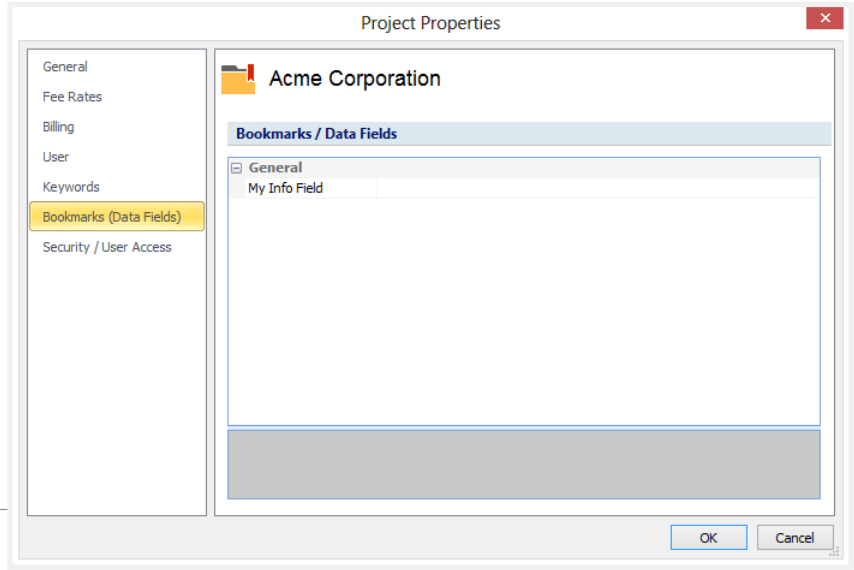
The definition of Keywords can not be changed here, please contact your administrator.

Bookmarks

Bookmarks

Your predefined fields for the project will be shown here and can be filled out accordingly. The field names can be used as bookmarks in your templates or documents.

Fields can be added with the administrator.



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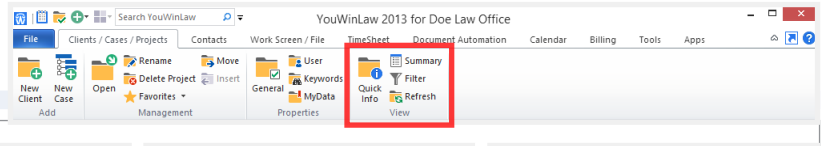
View



Quick Info

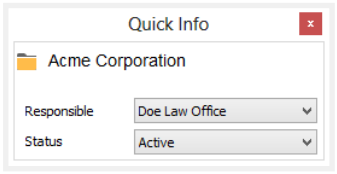
Quick Info Projekt:

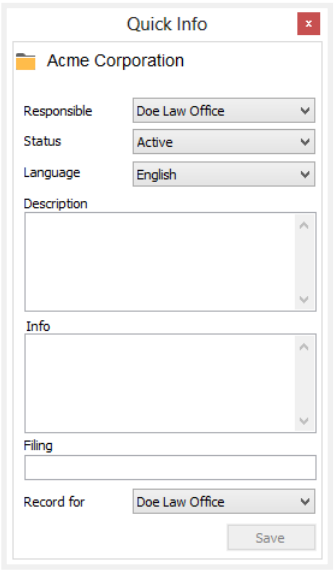
The dialog will show you the most important information about the current project. The information comes from the master data / project properties. These can be edited here - the master data is updated automatically.

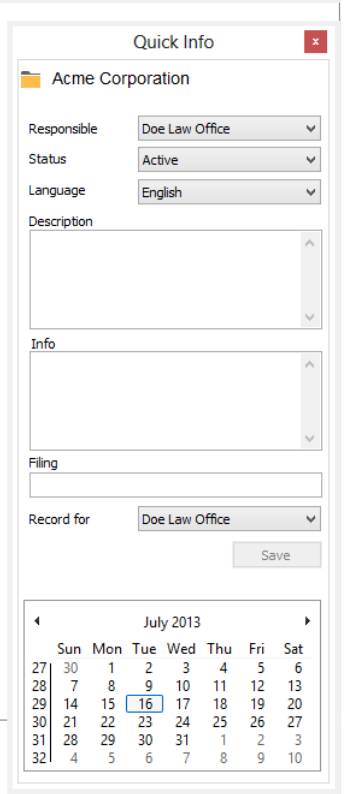
This dialog shows you the following informations:

- Project Name
- Responsible (eg Responsible partner / case owner / project manager)
- Project Language
- Project Status
- Project Description
- Info Field
- Filing Information
- Actual YouWinLaw User = normally same as logged in user

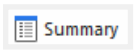
See also "General" on Page 19







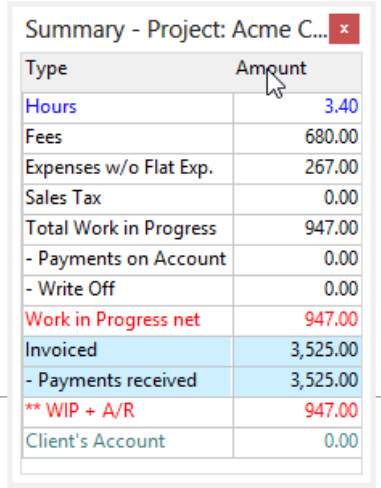
Summary



The window shows you a comprehensive cost / expense / payment information about the current project.

WIP (Work In Progress) and A/R (Accounts Receivable) shows the current balance of the project.

Info: The summary is always displayed in the currency of your database.



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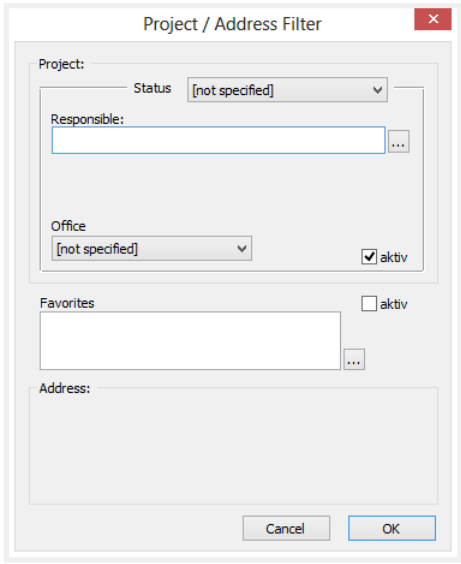
Filter

Filter

Filter the Projects in the Project Explorer

In the project explorer the user can set a personal filter. The user selects the criteria and the project lists are filtered accordingly. This means that he sees only those projects, which correspond to the selected criteria.

All definitions except the Status field are cumulative.



Set Filter

Select the desired criteria for your filter:

Status: It will show only projects that e.g. are active.

Responsible: Only Projects with the selected user as responsible are displayed.

Office: Only projects of the selected location will be shown.

Refresh

Refresh

The Project Explorer list will be refreshed (re-read from the database). This can also be done by using the F5 key.

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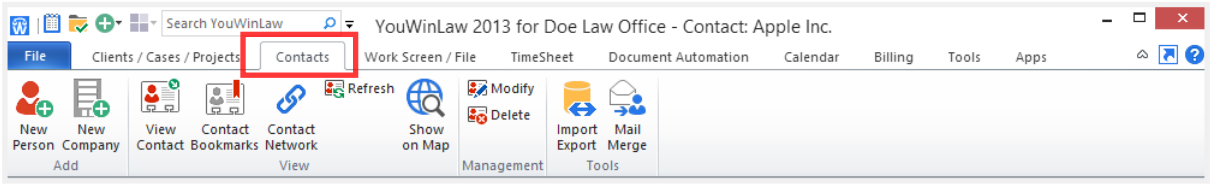
Contacts / Addresses

Address Management

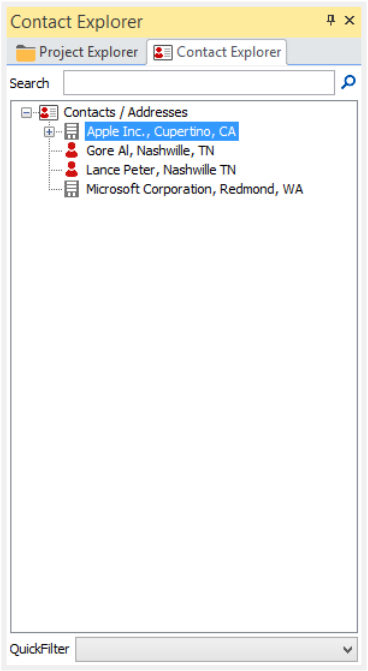
Our address administration has been conceived particularly for lawyers and their needs. Addresses are used in various contexts. Therefor it is important that they can be found and used easily. In YouWinLaw the addresses are **entered only once** and used as Client/Matter/Case/File/Project related address, as link in the Client Relation Manager, in all documents, for mailings etc.



Contact Explorer

In the Address List all addresses (unless filtered) are listed alphabetically. Addresses with a plus-sign [+] have Contact Persons and / or Locations (Domicile Addresses). You see the Contact Persons / Locations by clicking on the plus-signs.

You can open the address details by a double click on the address in the address list. If there are links to contact persons and/or other domiciles, those are displayed under the selected address.



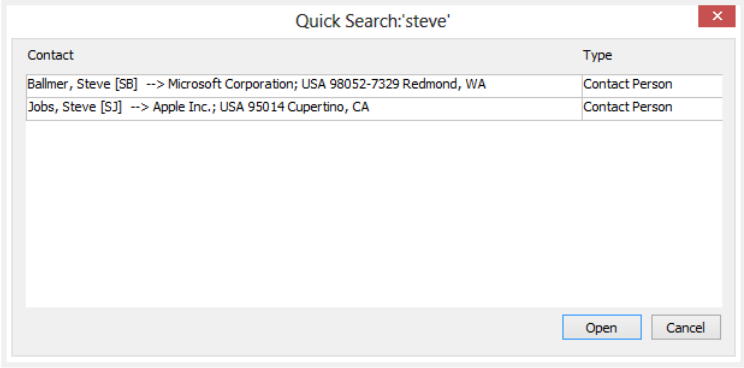
Search in Contact Explorer

If you want to search in the Address list, you can type the first letters of the name of the Company or Person in the search field of the address list. The first address that corresponds to the search argument is selected. You can switch to the next corresponding entry with the **F3** key.

QuickSearch

Type the first letters of the Name or First name of the Contact Person or of the Company Name in the search field. Press the button "Search" on the right or press the F4 key. Now the entire database is searched and the result is displayed in the QuickSearch window.

Select the desired address and press the button "Open". It will be added to the address list, in bold type, opened and can now be edited normally. Those temporary, bold type addresses remain in the address list, until it is refreshed or the program is restarted.



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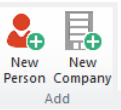
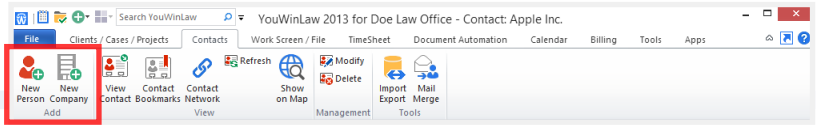
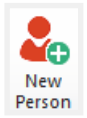


Add



New Person

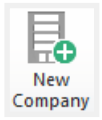


Select "New Person" or "New Company". YouWinLaw opens an empty address window.

YouWinLaw distinguishes between company and personal addresses. Select the appropriate type and the corresponding fields will be enabled / disabled.

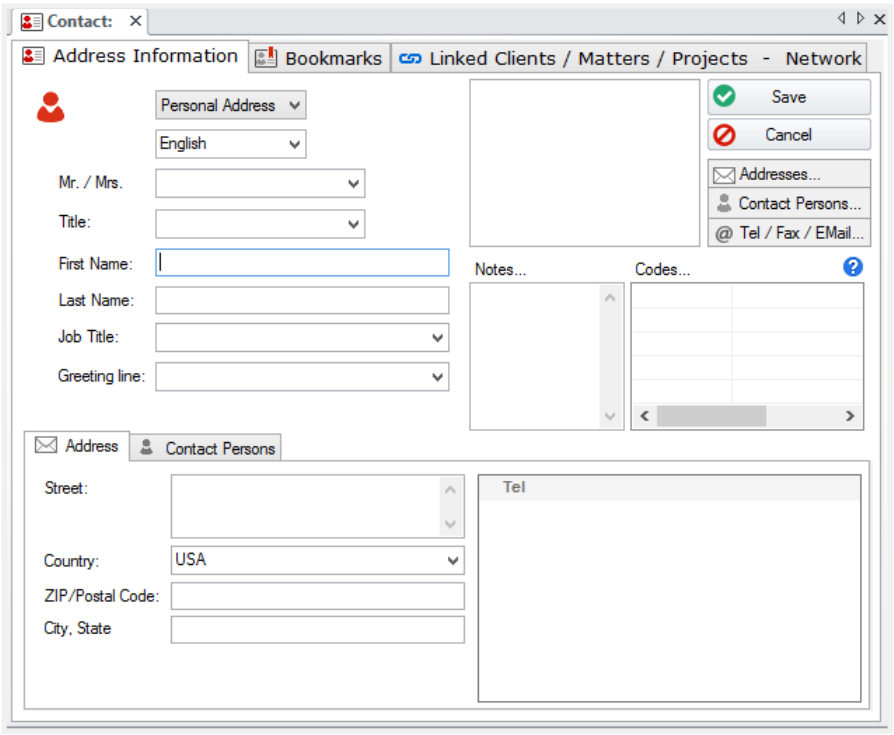
Use the tabulator key to switch to the next field. Fields like salutation will be created automatically, but you can change this at any time.

New Company



To create an address in a foreign language, you start by selecting the desired language. This will then be used for salutations, titles etc.

In some fields (salutation, title, greeting line) you can choose from a list or enter the data directly.



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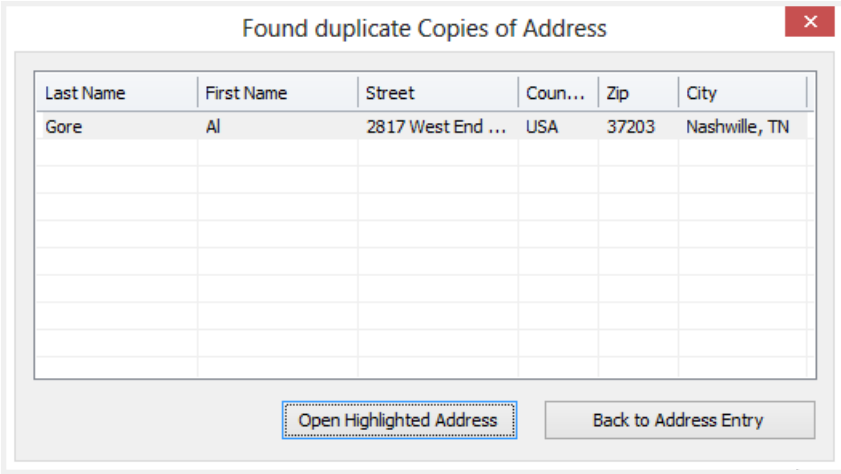
Automatic check of duplicate Addresses

If YouWinLaw finds a corresponding existing address in the database, a warning dialog will be shown. You can choose to continue or to use the existing one. Follow the instructions on the screen.



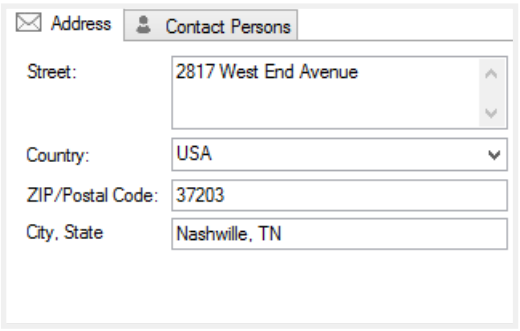
Automatic City / Zip / Postal Codes

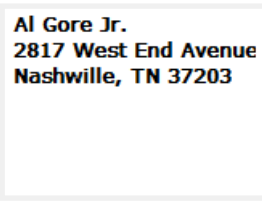
If YouWinLaw recognizes a postal code it will fill out the city/state field automatically. If the postal code corresponds to several Cities or areas, the window Select City is displayed. Select the desired entry and close with OK. If you know the name of the city, but not the zip code, type the name of the city (in the city field) and press the key combination Shift+Tab - the selection window for the zip codes is displayed.

Address View

The current address view will be shown here.

If you have chosen a different country, the address view is automatically adjusted.





Notes

Switch to the Note field by pressing the tabulator key and type your notes/remarks concerning the company or person. Press button "Notes" to get a larger window.

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Codes

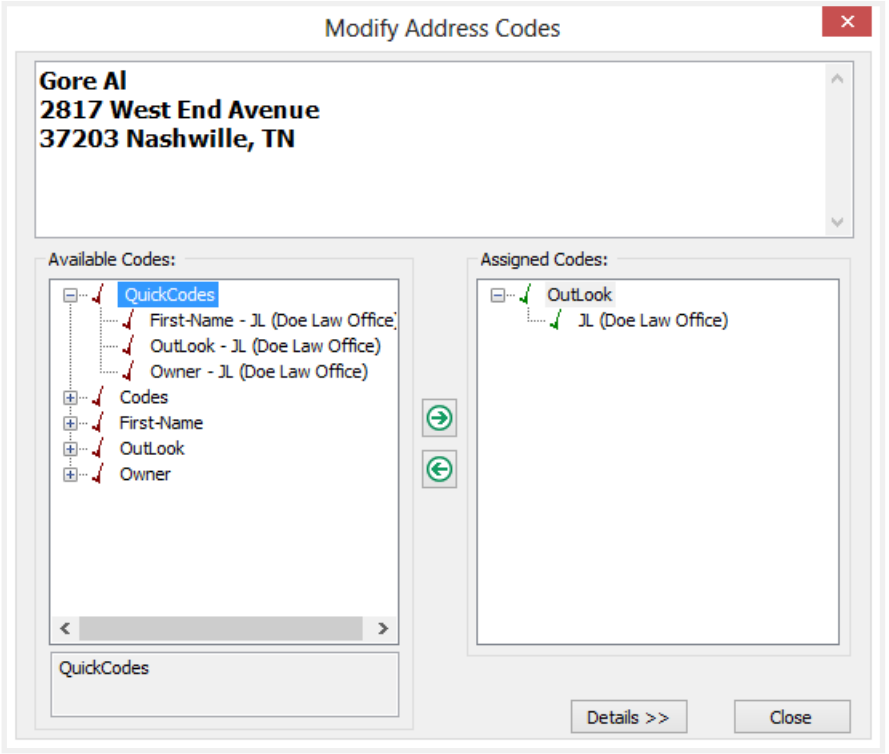
Depending on the focused entry (main address, location or contact person) you will always see the corresponding Codes in the Address Code window.

You can assign address codes to your address. Press the button "Address Codes" to get the specialized dialog.

The QuickCodes shows the available user codes for the actual login user. Click on the plus sign on the other codes to see the details.

Double Click on a code copies the code to the window with the assigned codes. You can also use the green buttons to insert or remove the codes.

Address codes can also be assigned to a single contact person. Double Click on the Contact Person, press button Address Codes in the Contact Person dialog.



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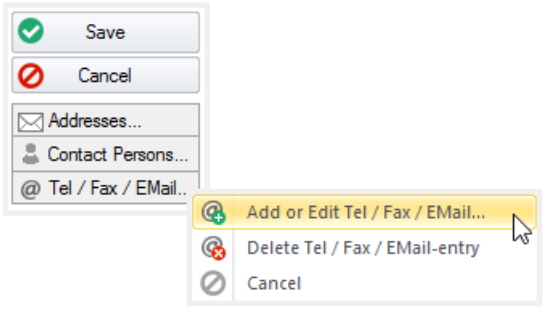
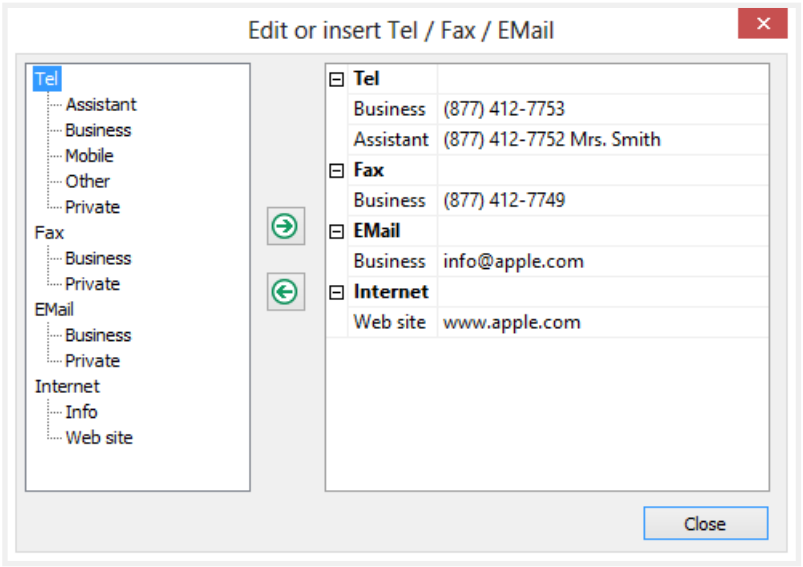
Phone, Fax, Web and EMail

Depending on the focused entry (main address, location or contact person) you will always see the corresponding Tel/Fax/EMails in the Tel/Fax/EMail window.



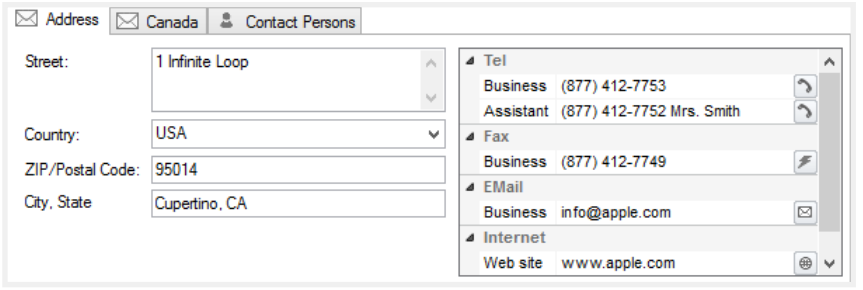
Click on "Tel / Fax / EMail" button (or right click in the Tel/Fax/EMail Window to get the context menu). Select Add or Edit Tel/Fax/EMail to add some new entries.



The number of entries is not restricted. For example you can use the entry "Tel/Business" as many times as you wish.

YouWinLaw also allows you to enter any remarks (type any text after the number).

You can also edit the data directly in the fields Tel / Fax / Email.



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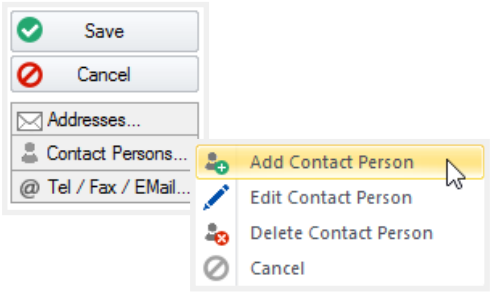
Contact Persons

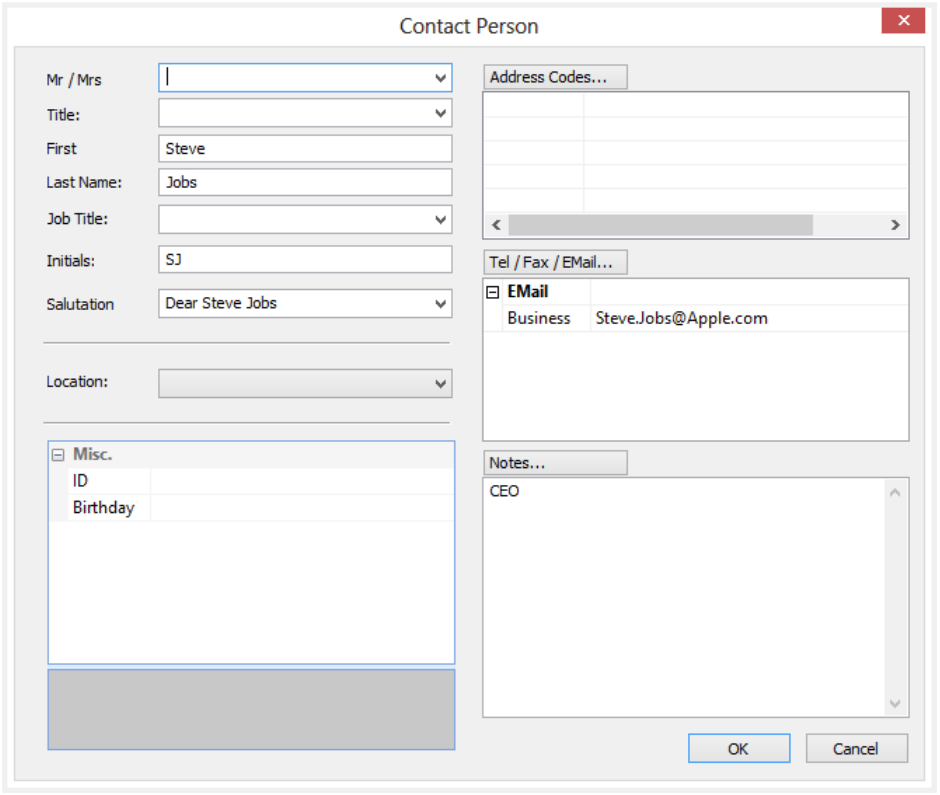
Click on the "Contact Persons" button or Double Click on the Contact Person in the list and the Contact Person Dialog will show up. From the Contact Person Dialog you control every aspect of the Contact Person.

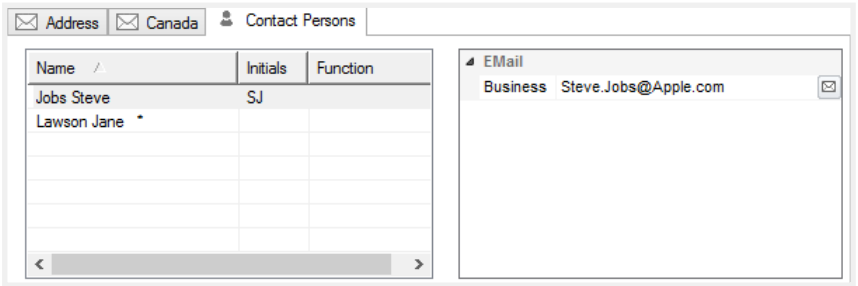
You can assign Address Codes, EMail, Telephone and Fax numbers as well as notes. Specially defined fields like Birthday etc. are also available.

You can assign individual address codes to every contact person.

You can even assign this contact person to a location, i.e. you will only see this contact person in context with this location in the address. A Contact Person that is assigned to a location will show up yellow in the Address List and you will only see the Contact Person under this Location. If the Contact Person is not assigned specially to a Location, this will be shown as a red icon in the Address List. This Contact Person can therefore be used in the Address of any Location (when creating a letter etc).







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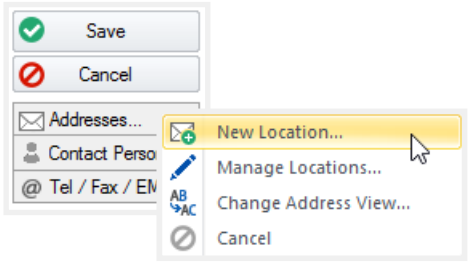
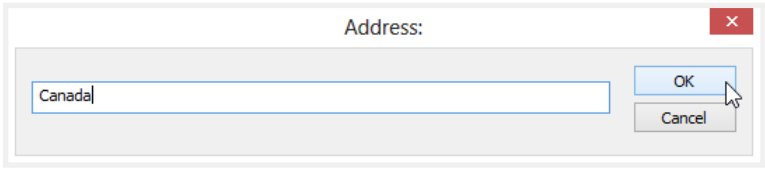
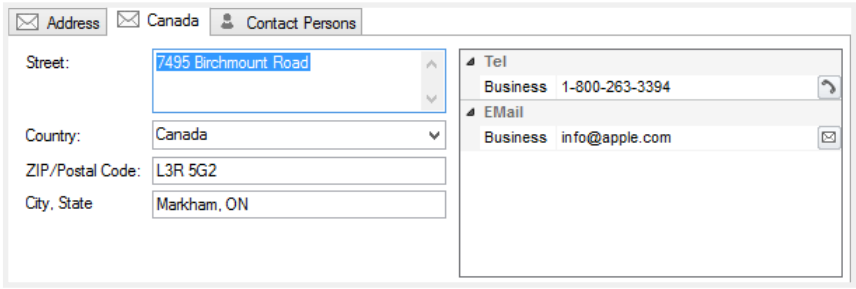
Locations (Sub Addresses)



You can have more locations (addresses) to one contact, like other offices / branches.

Select the desired address in the Address List. In the Address Window click on the button "Modify", click on button "Addresses...", select "New Location".

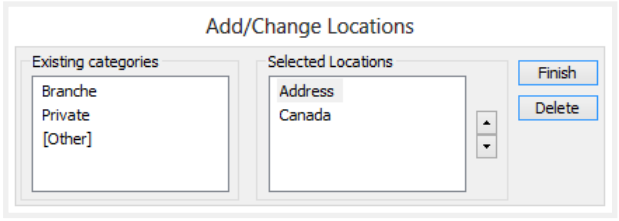




Modify or Delete a Location

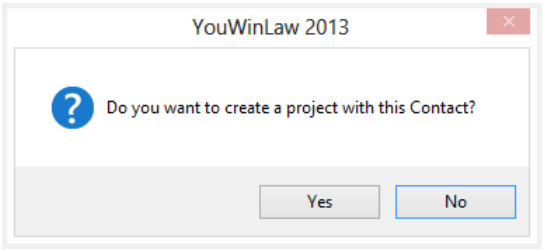
Select "Manage Locations...", then in Selected Locations click on the Location. Click another time, and an edit window will show up. Now you can change the Location name.

You can also change the order of the Locations. Select a Location, use the arrow buttons to move the Location up or down.



Automatically create a Project from the Address

YouWinLaw can create a new Project based on the Address data when you save a new address. YouWinLaw proposes the name/ first name or the company name and the city as project name. You can modify or just confirm the project name. The new project is immediately listed alphabetically in the project list and opened. In the Document Control Center the entered Address is automatically assigned to the new Project as a client address.



Click "No" if you want save only the address.

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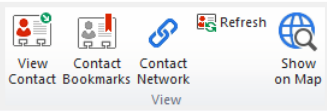
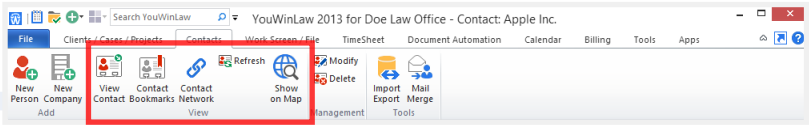
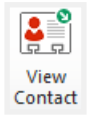


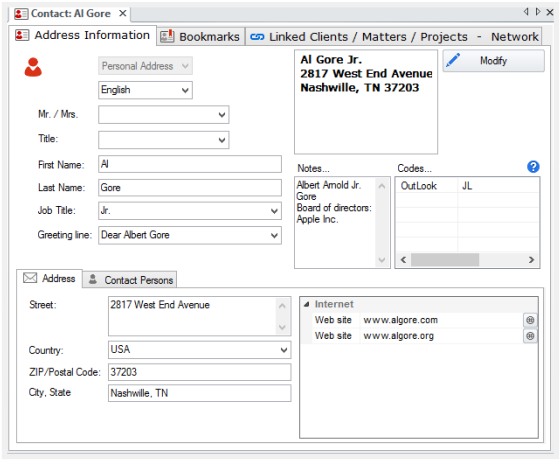
View



View Contact

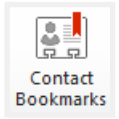
Select the contact / address which you want to view.

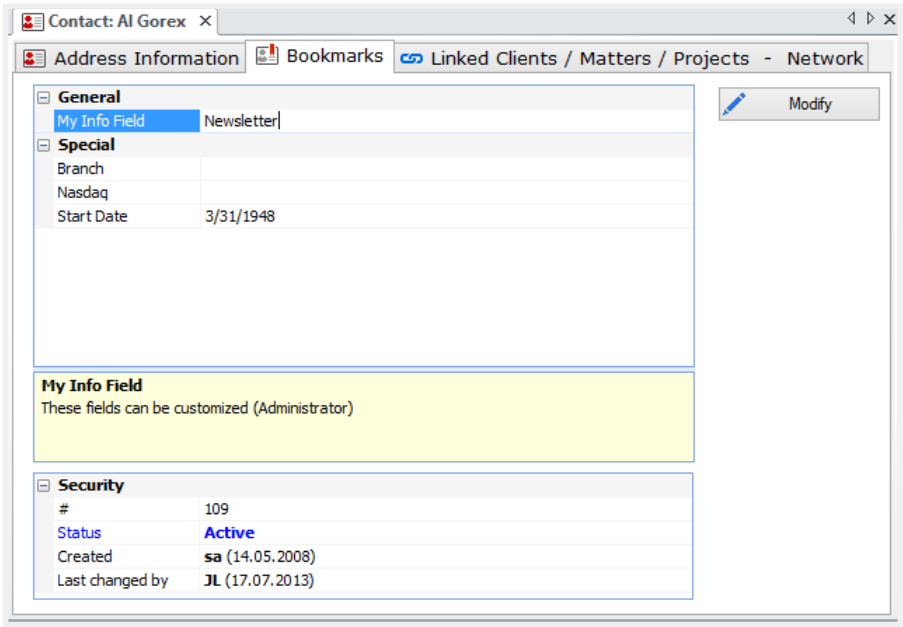




Contact Bookmarks

The register "Contact Bookmarks" shows other details about this contact / address like birthday or branch codes etc. In the security fields you have the internal address number, status (can be changed to inactive address), who created this address and date, last changed by and date. This fields can be customized.





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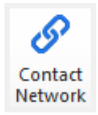
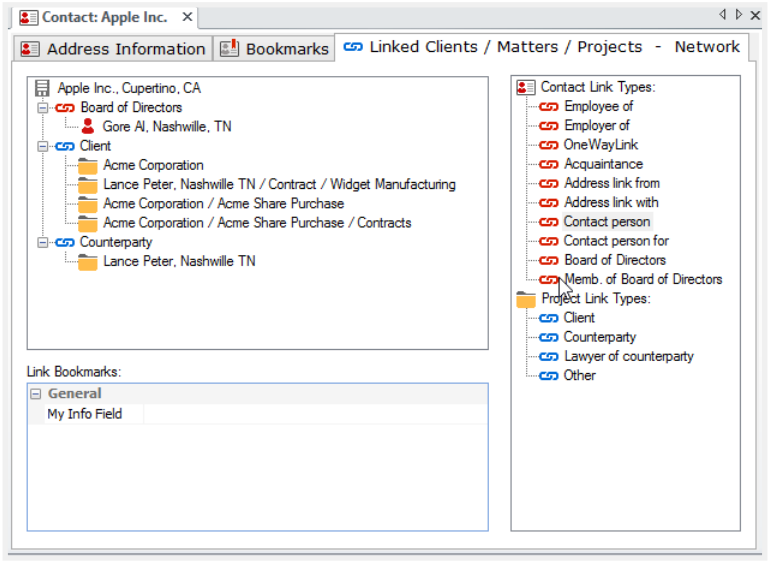
Contact Network



If you want to display the links of an address, select the desired address in the address list and click on the button "Contact Network" (or on the tab in the address view). The Address Network / Client Relation Manager offers you a comfortable graphic overview over the relations between addresses and Projects/Clients/ Cases/Matters. This can be an Address to Project or an Address to Address link.

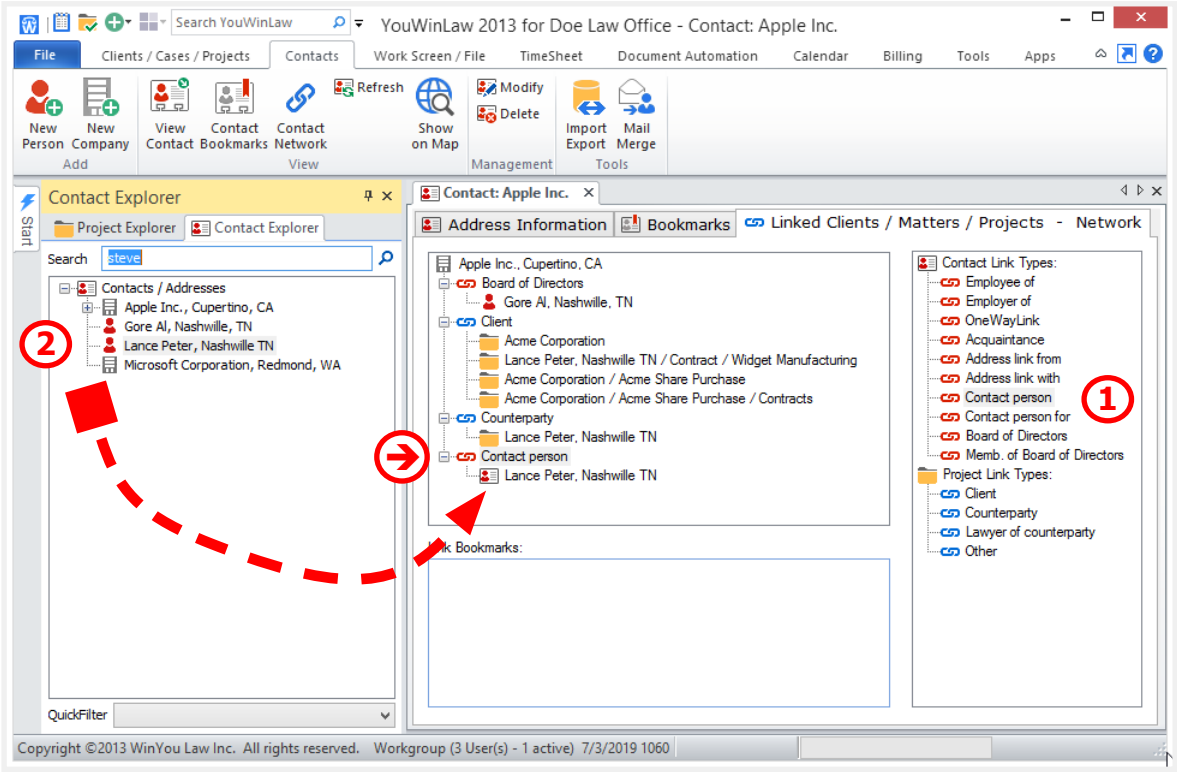
Project related addresses are automatically listed in the Client Relation Manager with their links.



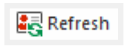
Create additional links with the selected Contact:

1. Select the type of link in the field Type of Links, e.g. "Contact person" and double click it. The link type is now automatically assigned.
2. Select the address/project you want to associate in the address / project explorer with the mouse (keep pressed) and Drag & Drop to the created link (e.g. "Contact person")

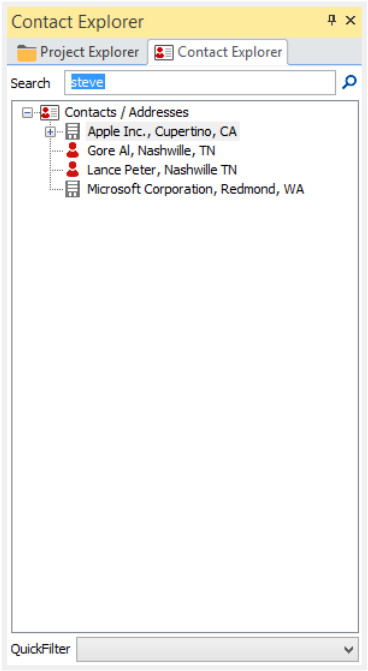
The definition "type of links" can be customized, check with your Administrator.



Refresh



The Contact Explorer list will be refreshed (re-read from the database). This can also be done by using the F5 key.



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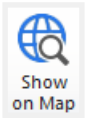
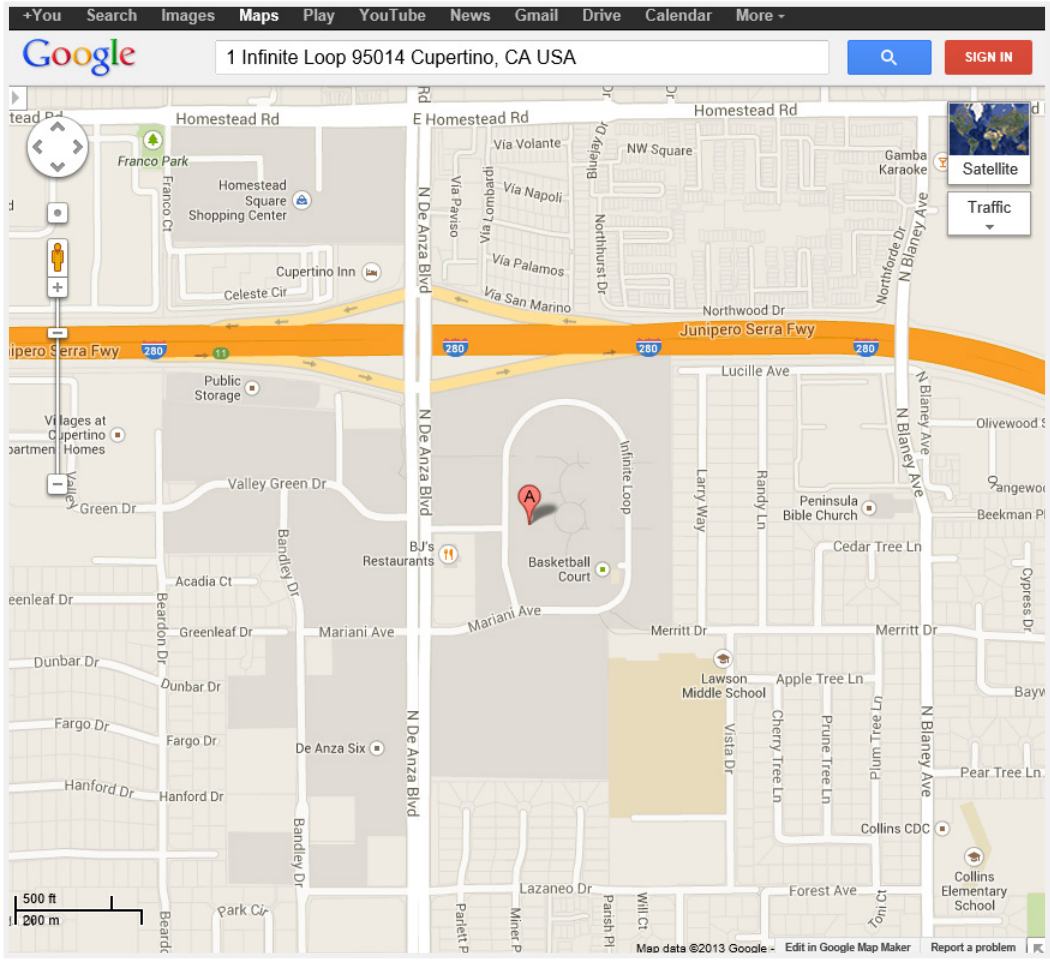
Show on Map

Clicking this button will display for the address on Google Maps. The map display can be customized, please contact your Administrator





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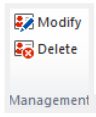
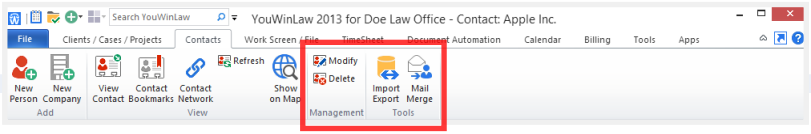
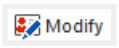


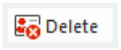
Management

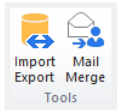


Modify Click here to modify the selected Contact / Address.



Delete Delete selected Contact / Address.

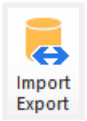




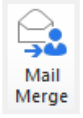
Tools

Import / Export Import / Export

"Import and Export" on page 130



Mail Merge Mail / Merge



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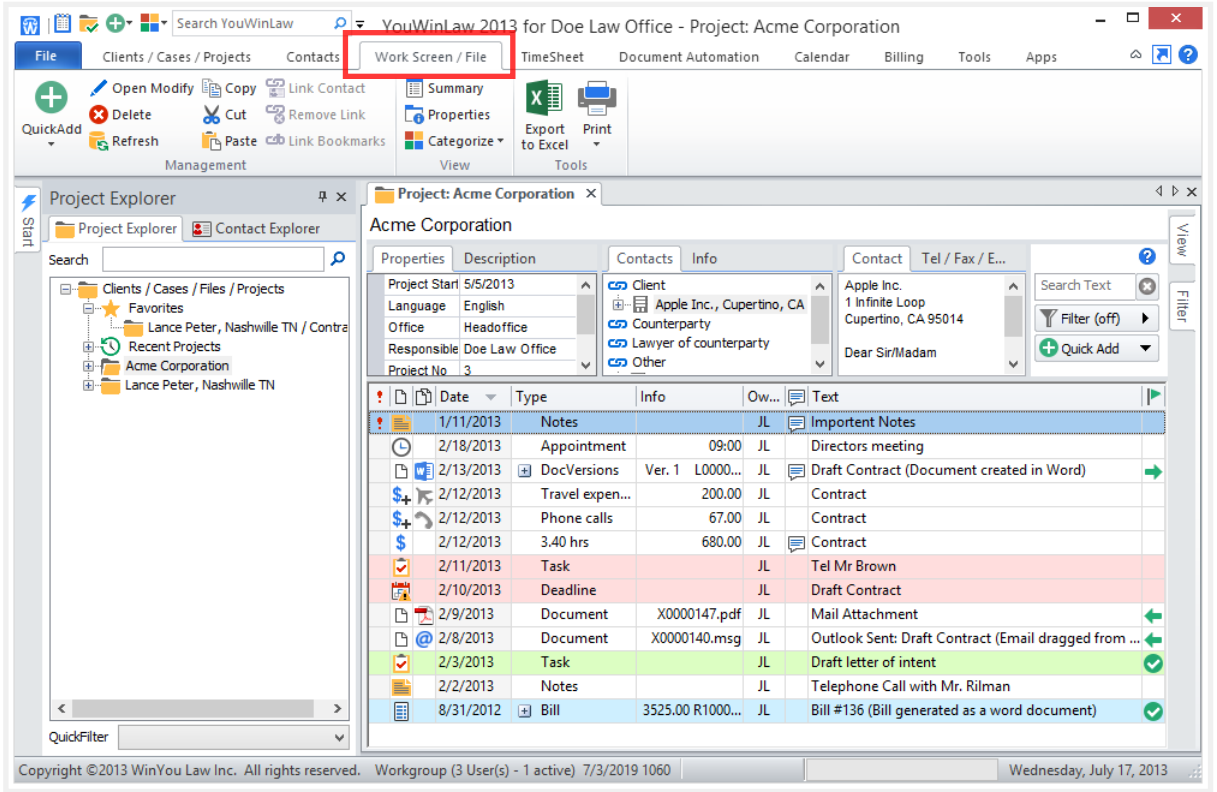
Work Screen / File

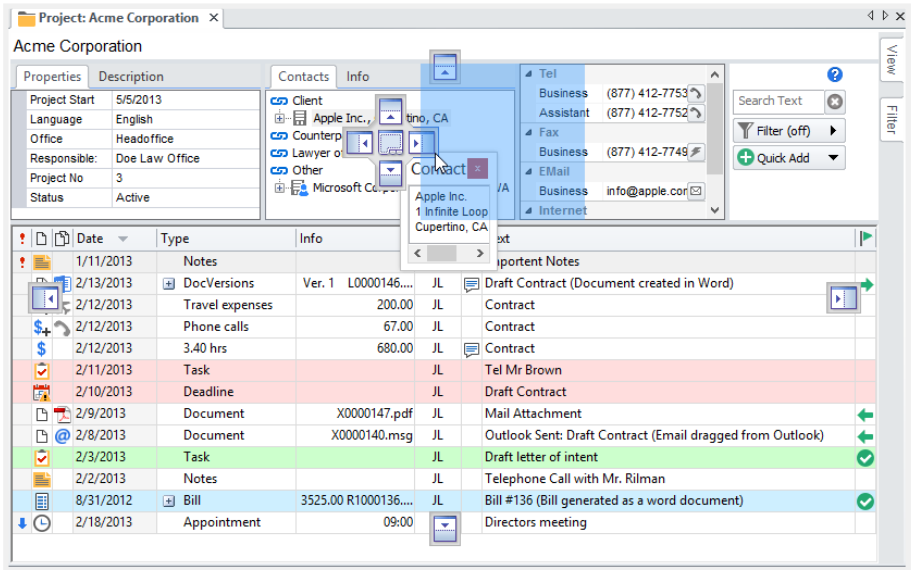
Introduction

All Activities (like Fees, Documents etc.) for the opened project are displayed in the Project Work Screen / File (electronic dossier). All Work Screen / File-entries are registered here - all with the same procedure!

To open an Work Screen entry, you can double click it or right click in the Work Screen and select Modify / Open from the context menu.

You can display the detailed information about a project and its properties with a mouse click. In the detailed project information you can define the basic data, e.g. Project language, Office, Users and their functions (e.g. project manager) and project specific rates or Sales Tax, Keywords etc. The client address with all the accompanying information is directly visible in the Work Screen.





You can customize these views yourself and make windows and columns invisible / visible or dissemble and group differently.

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Project Information

Here are all the most important project information such as project name, project properties, information boxes, address links, along with the display of address and telephone / email. Next to these windows we have a dynamic text search, filtering, and a button for quick add of entries.

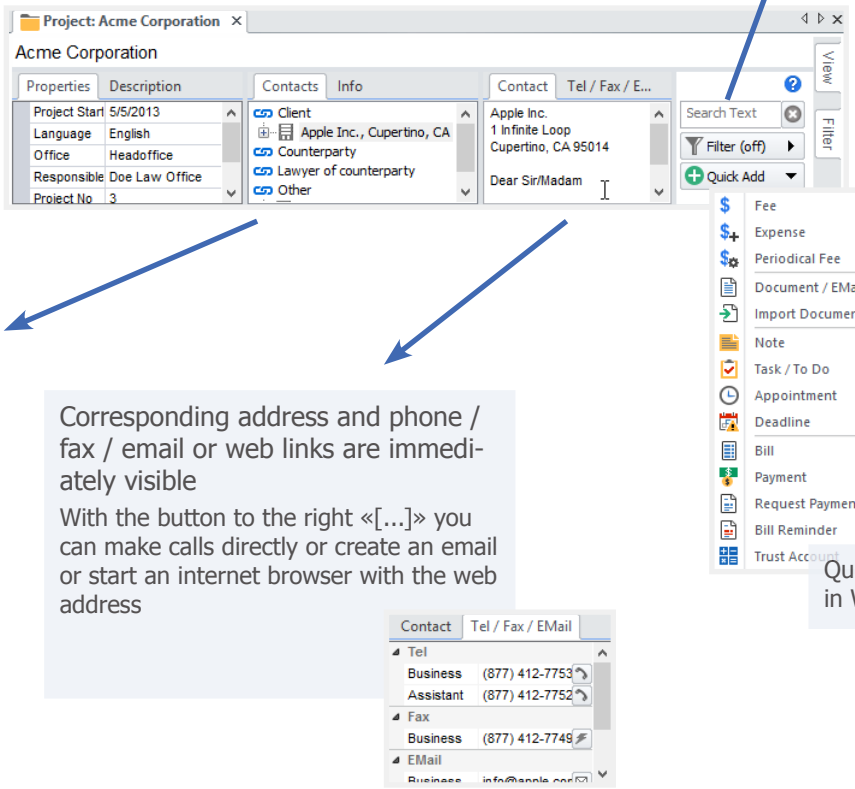
On the right side, there are other functions such as filtering and view configuration. Just go with the mouse over it and the corresponding window opens. All these windows can be set individually.

Project Properties:
- Project Start Date
- Language
- Office / Location
- Responsible
- Project number
- Status

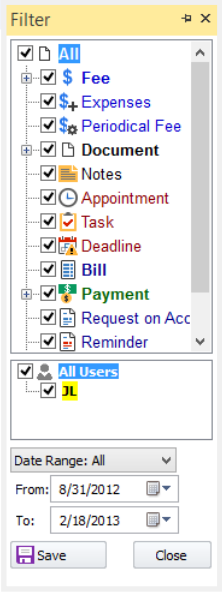
Contact and Address Links:
- Client Address
- Billing Address
- Contractors
- Counter party
- Lawyer of counter party
- Your own link name

You can easily create links with drag and drop from the Contact Explorer. These link types are customizable.

Dynamic Search in Journal / Log with "Search Text".



Filter entries in Work Screen / File



Quickly adding entries in Work Screen / File

Corresponding address and phone / fax / email or web links are immediately visible

With the button to the right «[...]» you can make calls directly or create an email or start an internet browser with the web address

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Columns in Work Screen / File

Typ and SubTyp

Example of symbols for documents:

Document

- Word Document
- PDF
- E-Mail

etc.

The advantage of the 2 levels is that you can sort them, filter or group them.

Additional Information

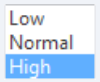
When you point to this icon with the mouse, additional information like the content of the imported email attachment, or email, content notes, fees, etc. will be shown.

By double-clicking on the icon, a dialog appears with all the contents:

Priority:

- High
- Normal
- Low

Just click on the box by the entry in log, in which you want to change the priority, a selection will be displayed:



Select the appropriate priority.

The log list is sorted accordingly: entries with high priority appear first.

Date	Type	Info	Owner	Text
1/11/2013	Notes		JL	Importent Notes
2/13/2013	DocVersions	Ver. 1 L0000146....	JL	Draft Contract (Document created in Word)
2/12/2013	Travel expenses	200.00	JL	Contract
2/12/2013	Phone calls	67.00	JL	Contract
2/12/2013	3.40 hrs	680.00	JL	Contract
2/11/2013	Task		JL	Tel Mr Brown
2/10/2013	Deadline		JL	Draft Contract
2/9/2013	Document	X0000147.pdf	JL	Mail Attachment
2/8/2013	Document	X0000140.msg	JL	Outlook Sent: Draft Contract (Email dragged from Outlook)
2/3/2013	Task		JL	Draft letter of intent
2/2/2013	Notes		JL	Telephone Call with Mr. Rilman
8/31/2012	Bill	3525.00 R1000136....	JL	Bill #136 (Bill generated as a word document)
2/18/2013	Appointment	09:00	JL	Directors meeting

Flag: Shows:

- Document imported
- Document created in YouWinLaw
- Fee billed
- Bill paid
- Task done etc.

When you point to the icons with the mouse the relevant information will be shown.

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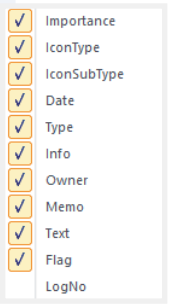
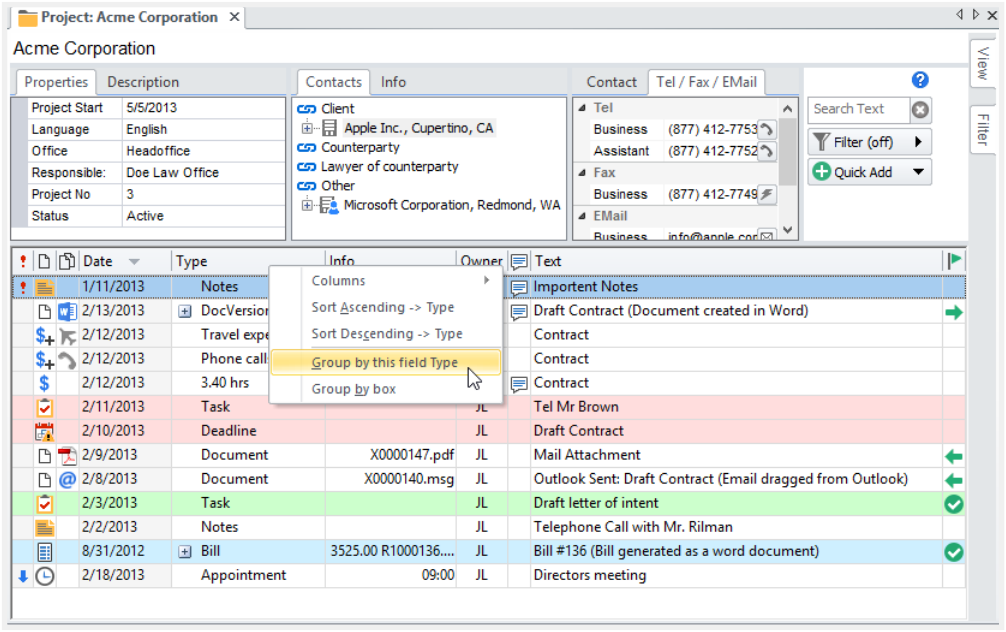
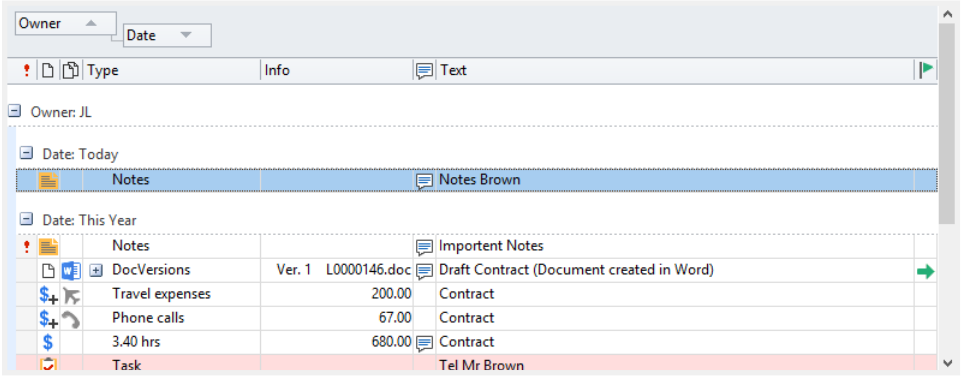
Sorting and Grouping

When you right-click a title column, it displays the columns context menu:



- The column will, depending on whether with a check mark or not, be visible / invisible
- You can choose whether you want to sort or group by the selected column.
- Show the grouping field.





Grouping field:

You can drag the column title with drag and drop to the grouping field:

In the example below, we have the column heading "owner" as the first drawn into the grouping field, this is grouped by the initials of the owners.

In the second column, we have "date".

This makes the Work Screen / File also a quick **analysis / reporting tool**. If you also use the filter function and / or the search, you will receive individualized, very comprehensive information!

Of course, you can print out the result - see also "Print" on Page 66

You can save these settings, see also "View / Modify Preferences" on Page 42

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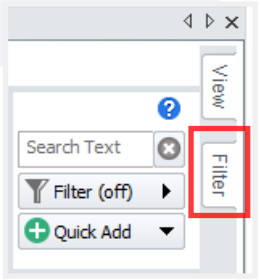
Filtering

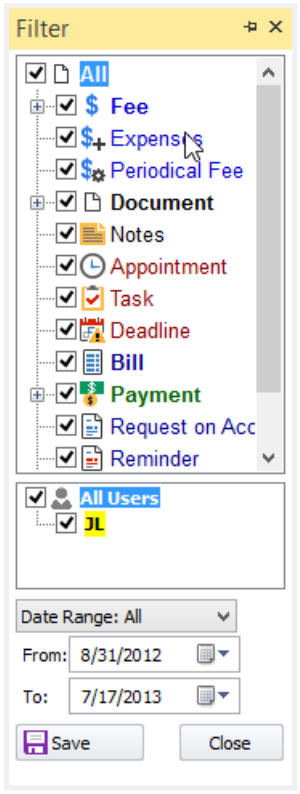
TIP: Permanent Filter window

When you click on the window is always kept open

Click on the button «Filter»

The filter dialog is divided into type / subtype, owner and date

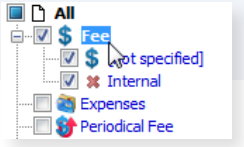




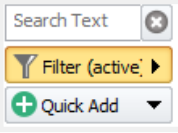
Typ / Subtyp

Corresponds to the various log types and log subtypes

TIP: If you click on the text (after the icon) then only this will be selected.

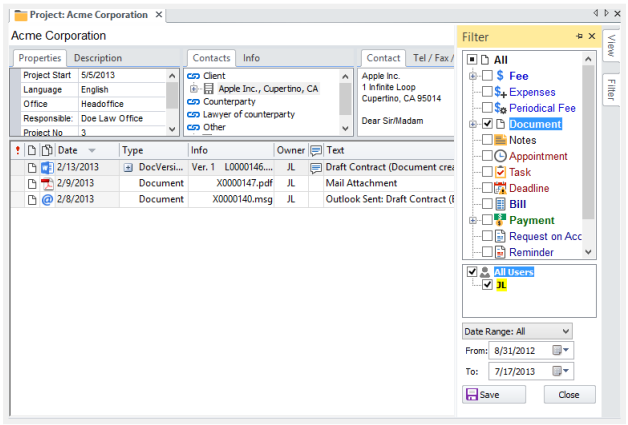


The button "Filtered" appears in orange when a filter is active.



Owners (Users)

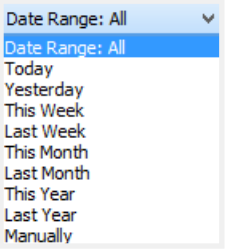
All users who have made an entry in this Work Screen / FIle will be shown here.



Date

Here the date is automatically displayed: the date of the oldest entry to the latest entry date.

Use the button "Date Range" to make a quick selection.



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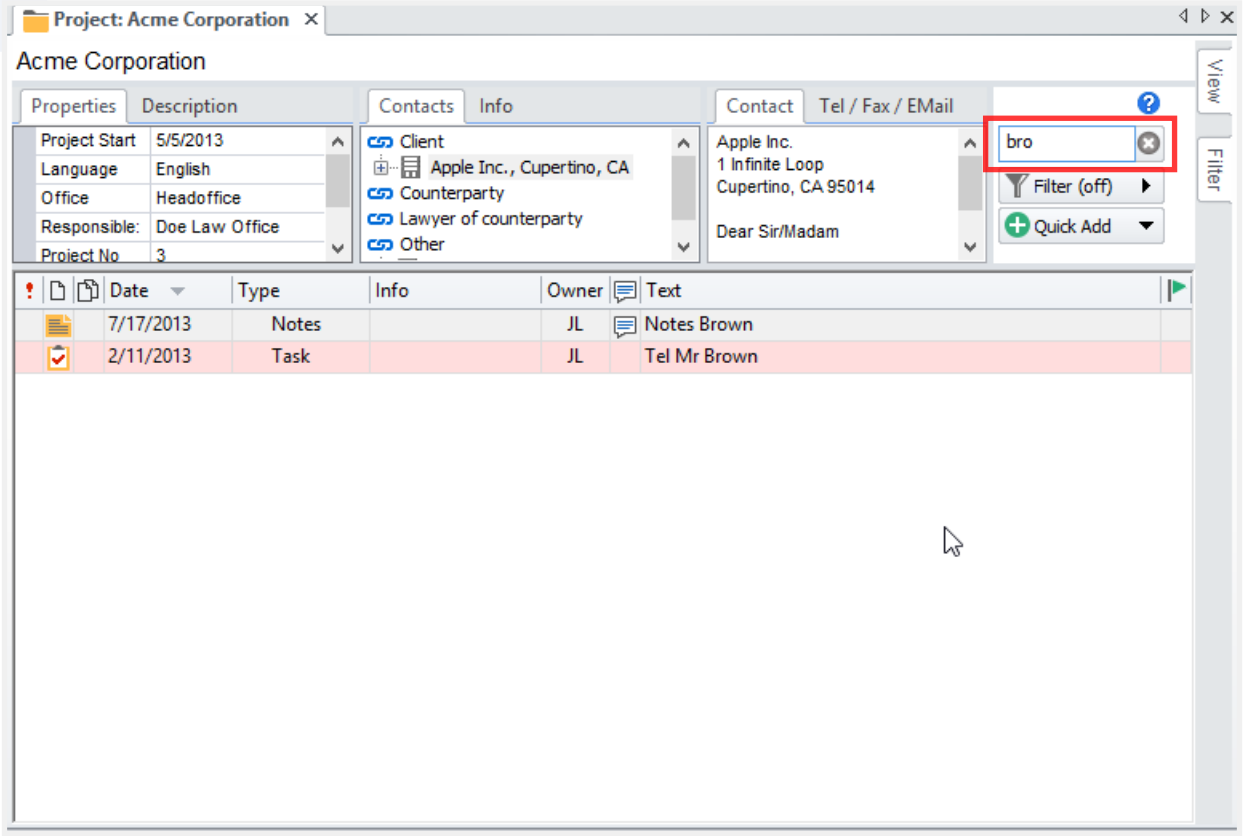
Text Search in Work Screen / File

Enter Search Text (either initials or a word / word fragment) in the "search text" field

After each letter, the messages in the Work Screen / File are immediately filtered, ie only entries which contain these letters are shown.

All columns are searched.



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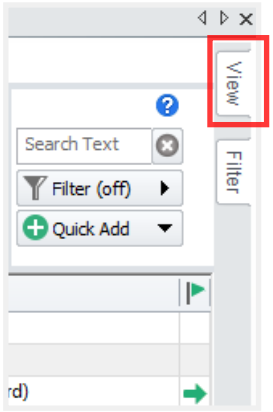
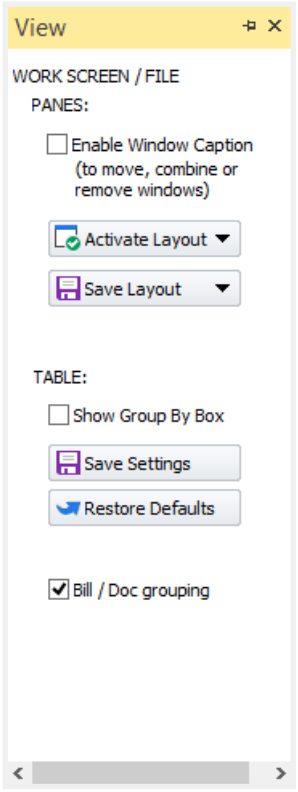
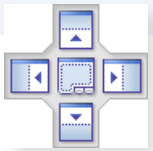
View / Modify Preferences



Click on "view" or just move the mouse over it:
The "view" window opens.



Window layout within the Work Screen / File:
You can save or enable different layouts. Select "Windows Caption" to move the window, group or to delete them.
TIP: Use the "button dock": If you start to move a window, it appears automatically.



Layout of the Work Screen / File table:
Here you can save your own layout or restore the original ones.

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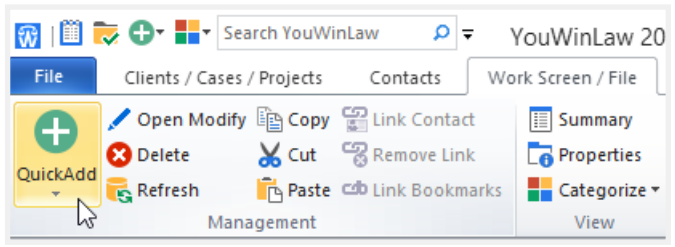
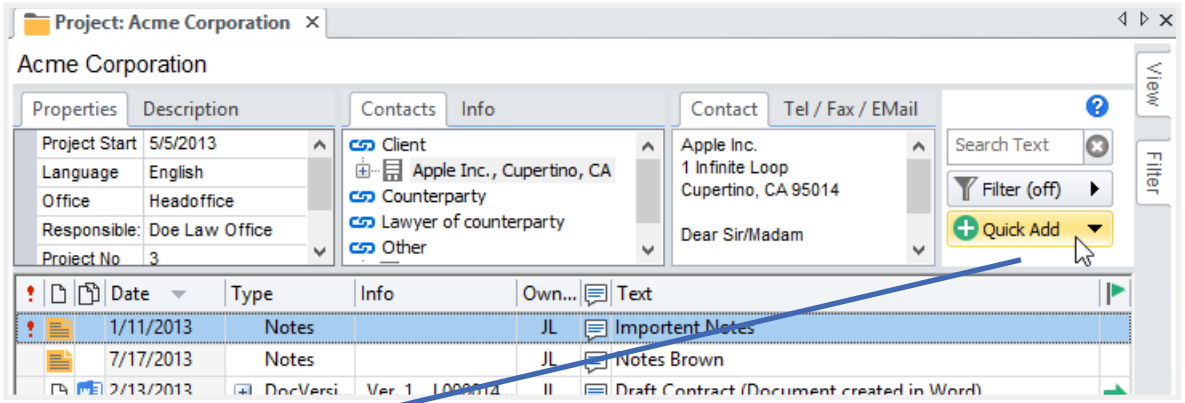
Data

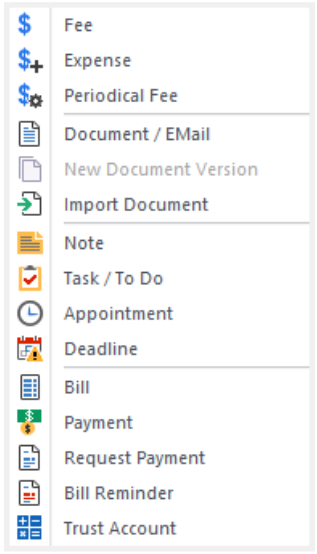
Quick Add

You can insert entries directly in the Work Screen / File:

Click on "Quick Add"







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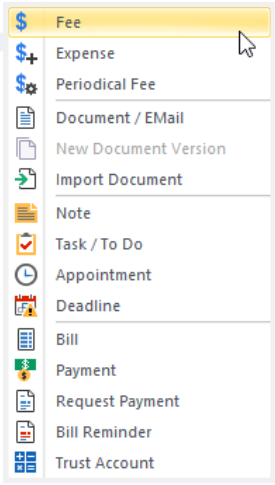
$ Fee



Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

User: The login user is proposed automatically.

From: You can enter a time period from

To: You can enter a time period to, or minutes

Hours: Here you can enter the time in decimal hours (0.5 = 30 minutes)

Type: If there are various types of fees you can select the desired type here.

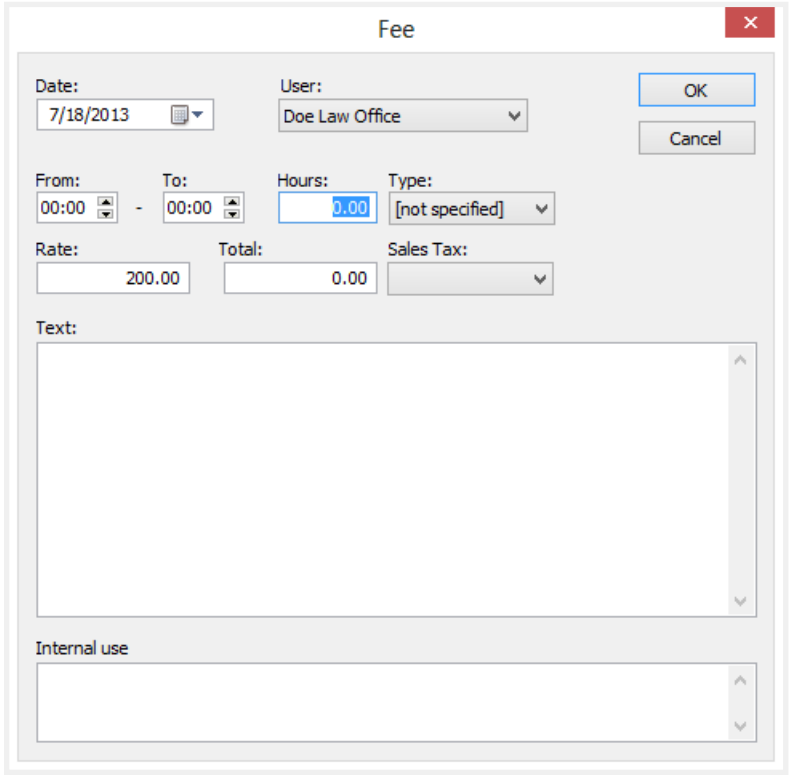
Rate: Can be modified for an entry. Standard display is the hourly rate of the current User or Project.

Total: Is calculated automatically according to the time period and the rate. Can be overwritten.
You can also enter a flat fee without hours or a time period.

Sales Tax: Standard display is the Sales Tax or VAT Rate of the project. Can be modified for an entry.

Text: The corresponding text. You can use text shortcuts.

Internal use: Internal text, will not be shown on the bill



- If you want to enter several fee entries in a row, press SHIFT while closing with the OK-button. The fee entry is saved and a new Work Screen / File Fee entry dialog is opened.
- You can enter fees and expenses in the Timesheet.

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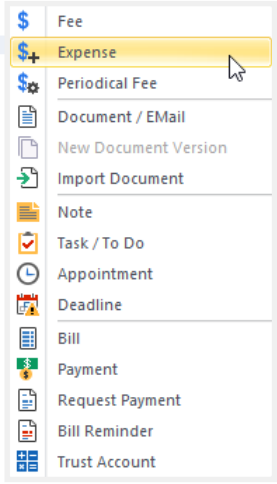
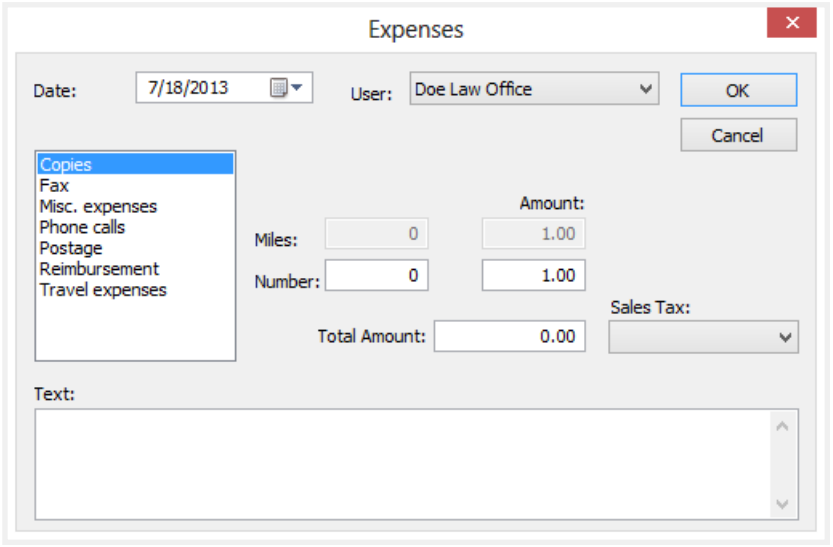
Expenses





Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

User: The login user is proposed automatically.

Expense: Select the type of expense you want to enter.

Miles: If you have selected travel expenses, type here the number of miles. The expenses total is automatically entered in the field Total.

Number: If you have selected Total Copies, you enter the number of copies. The expense total is automatically entered in the field Amount.

Amount: Type here the total amount of the selected expense.

Sales Tax: Standard display is the Sales Tax or VAT Rate of the project. Can be modified for an entry.

Text: The corresponding text. You can use text shortcuts.

You can enter fees and expenses in the Timesheet.

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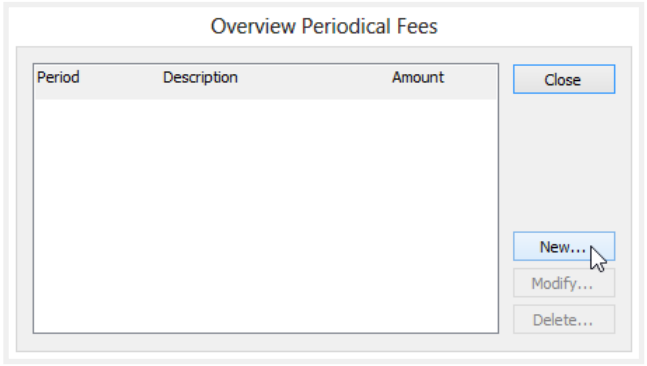
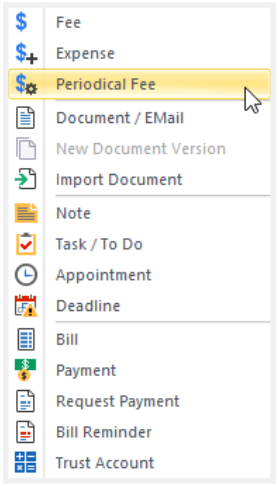
Periodical Fees

An overview over all periodical fees for this project will be shown.

Press "New..." to create a new entry.





From: Type the starting date.

To: Type the ending date.

Period: Select the desired periodicity.

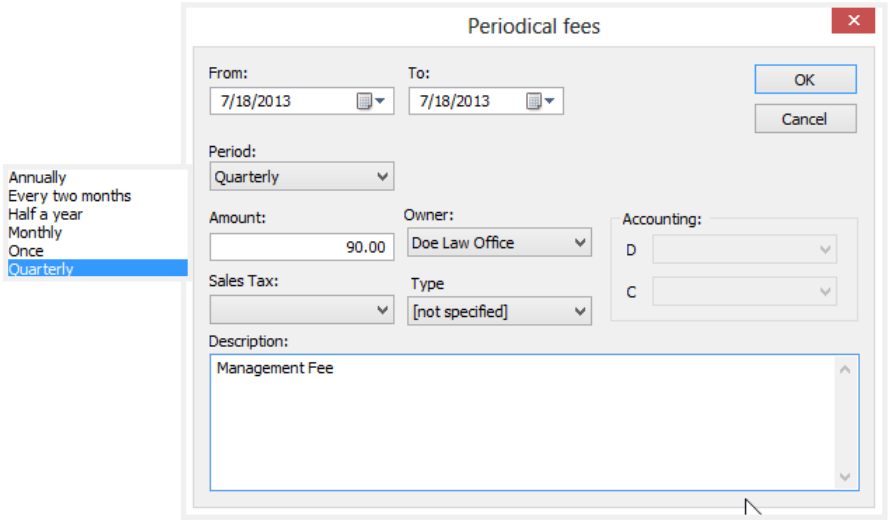
Amount: Type the amount you want to be invoiced.

Tax: Select the desired Sales Tax or VAT-rate with the arrow-key.

Owner: Select the desired user with the arrow-key.

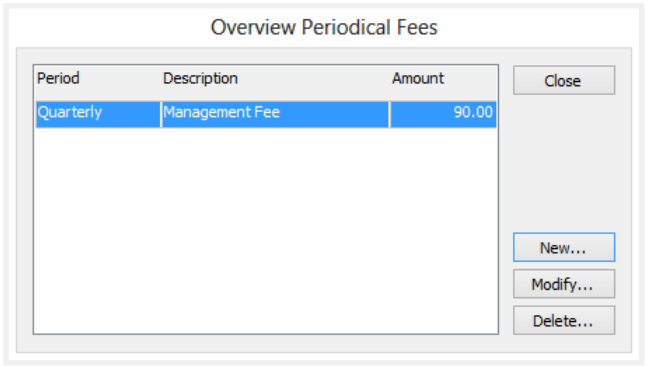
Type: Select the desired type of periodical fee with the arrow-key.

Description: Enter the text to be displayed.



Close with the "OK" button - and, in the following window, with Close.

This periodical fees will show up automatically in the corresponding Billing



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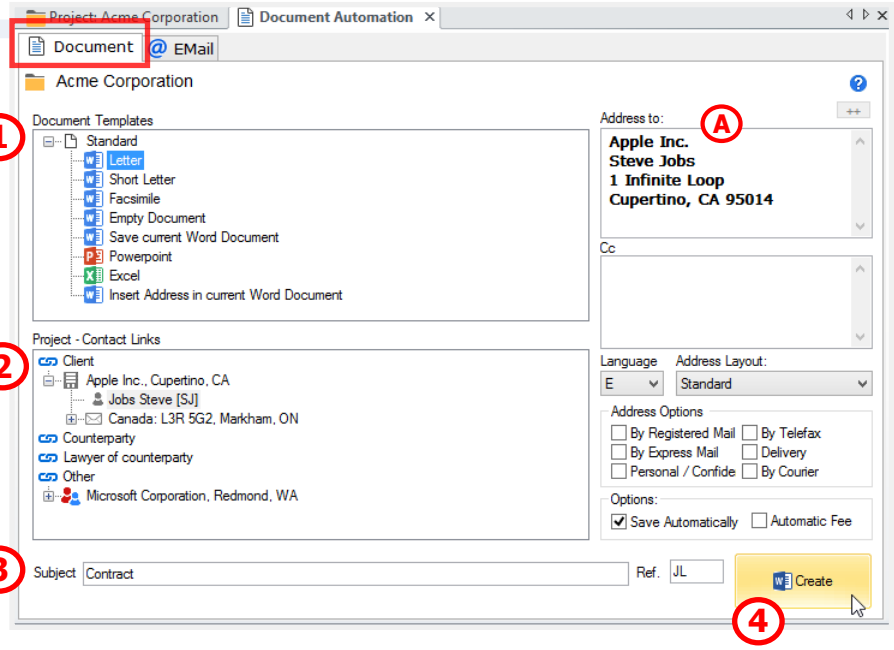
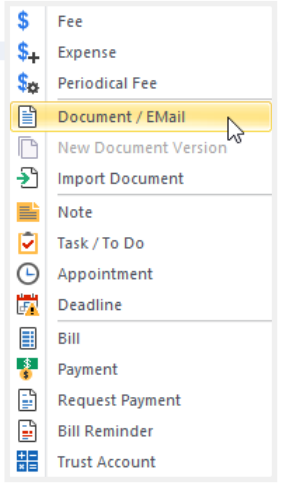
Document / E-mail

Create **Document**

Document automation tab Document:





1. Select a document template

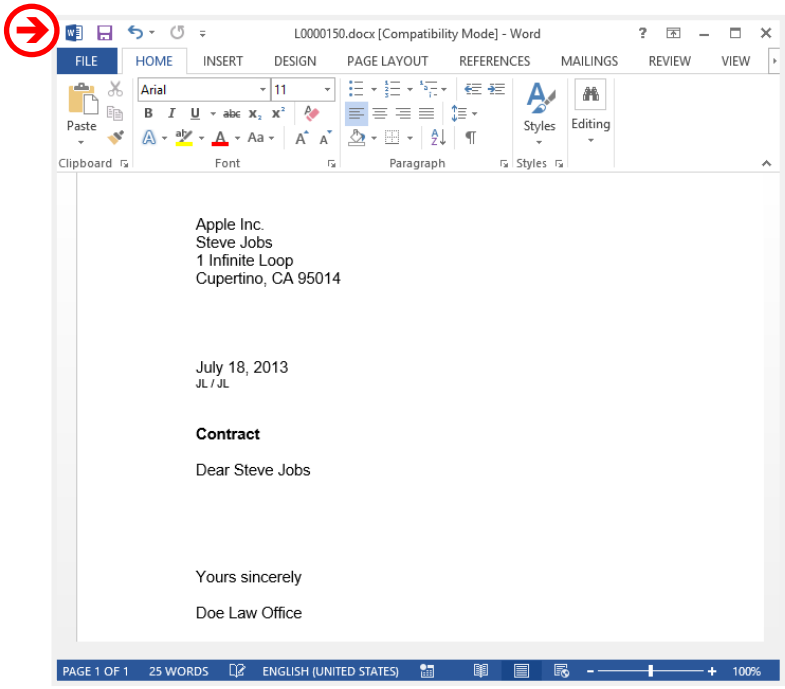
2. Select a Contact / Address

Select the Project Related Address (or in this case directly the Contact Person). In the Address window you will see how the Address will exactly be shown in the document. You can also drag a contact / address with the mouse from the Contact Explorer directly to the address window Ⓐ (Drag & Drop)

3. Subject

The Subject will be shown in the Work Screen / File Document Entry for the project and will also be inserted in the document.

4. Click on the button «Create»



- Word opens with the corresponding template as a new document
- All bookmarks in the template are filled in (address, subject etc.)
- The document is saved automatically
- It adds a corresponding entry in the Work Screen / File
- If the «Automatic Fee» is enabled, a fee will be generated automatically

See also "Create Document" on Page 75

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Document / E-mail

Create **E-mail**

Document Automation tab E-mail:

1. Select an e-mail template

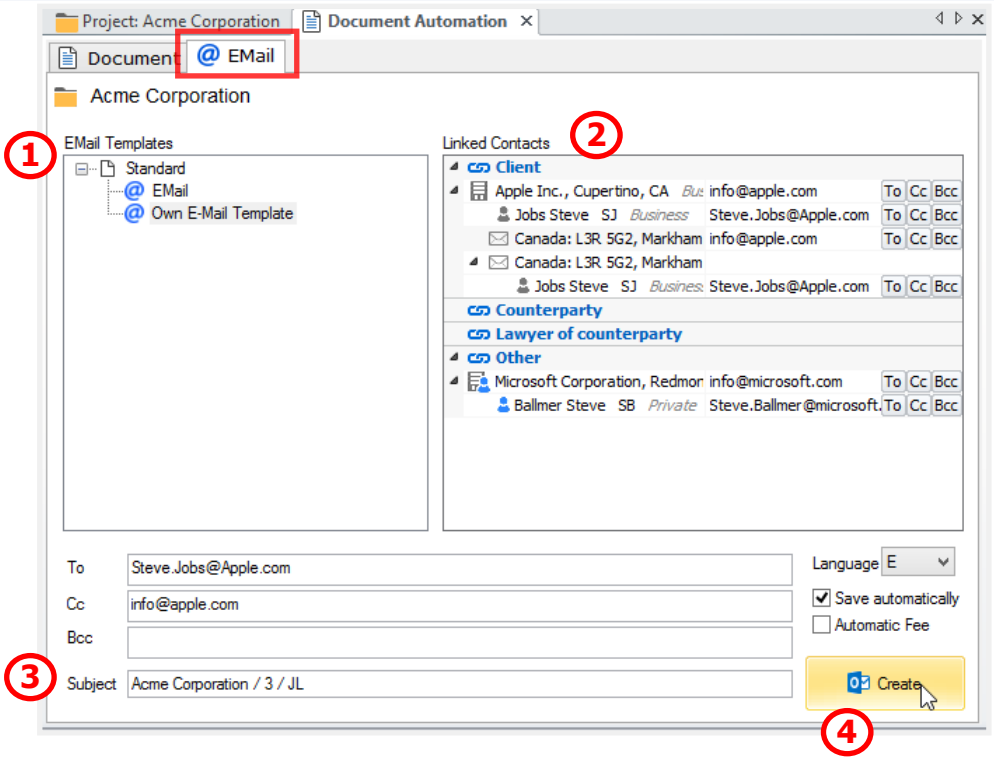
2. Select one or more e-mail addresses. Use the [To], [Cc] and [Bcc] buttons to add the e-mail addresses.

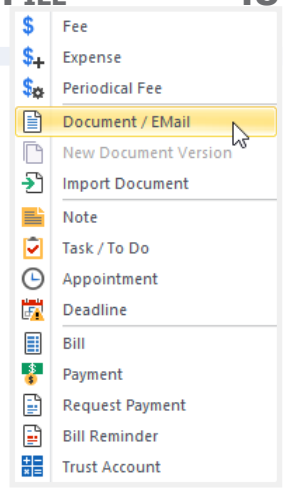
3. Subject

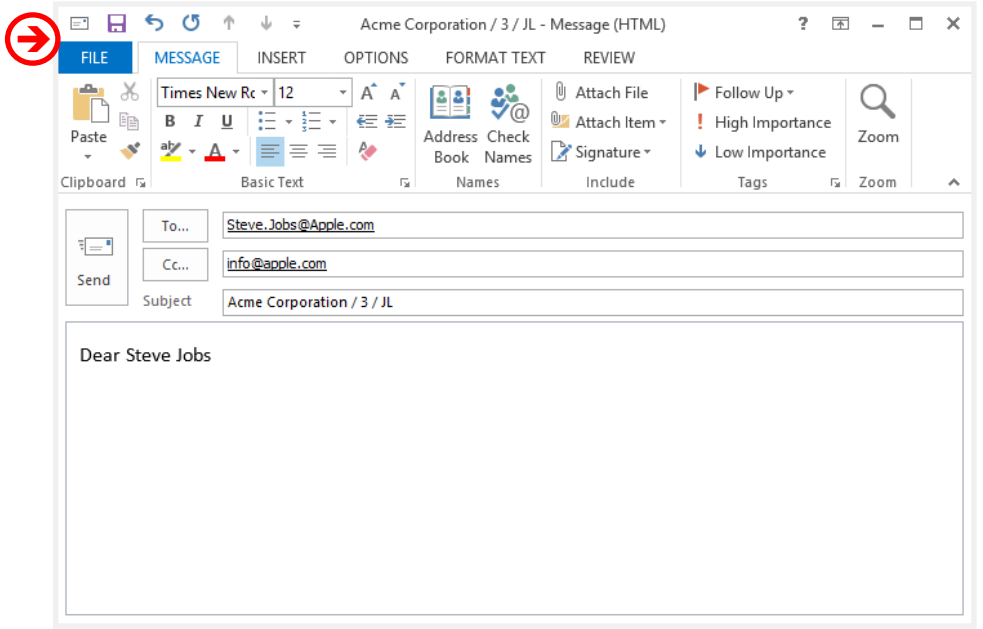
   Subject can be automatically created with Bookmarks in the e-mail template

   The Subject will be shown in the Work Screen / File Document Entry for the project and will also be inserted in the e-mail.

4. Click on the button «Create»







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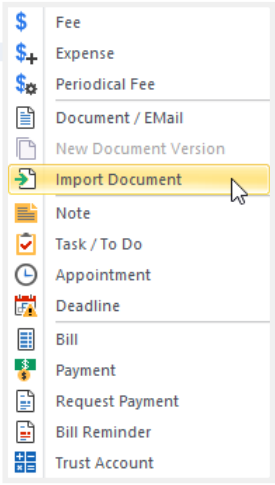
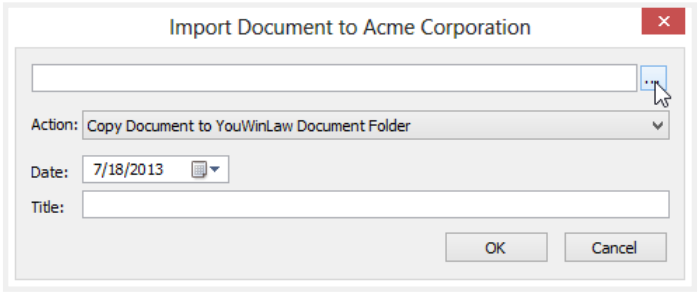
Import Document / File

Import (or create a link to) a Document in YouWinLaw

You have different possibilities to import an external document (or link):



- Import via Dialog



- With DRAG & DROP directly in Work Screen / File window
  (from an e-mail, e-mail attachment, windows explorer, desktop etc.)

- Using the "Copy" / "Paste" Buttons see also "Copy" on Page 60

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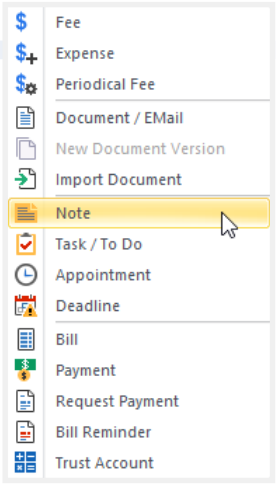
Note

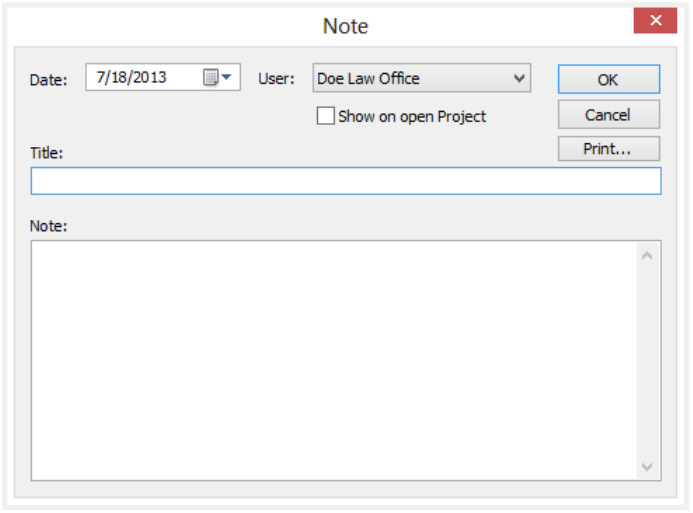


Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

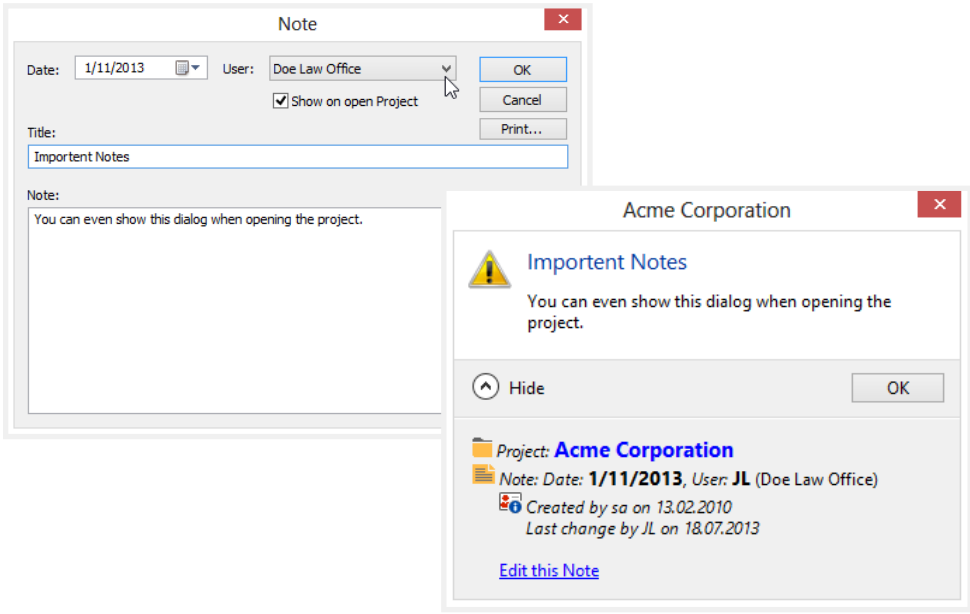
User: The login user is proposed automatically.

Title: Enter the title that will be displayed in the Work Screen / File table.

Note: You can enter as much text as you like. You can use Text Shortcuts (AutoCorrect)



When opening the project, the note may appear as a **warning message** when "Show on open project" is enabled.



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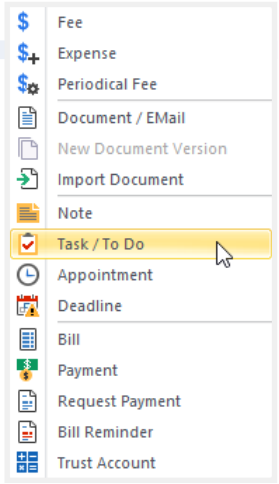
Task / To Do



Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

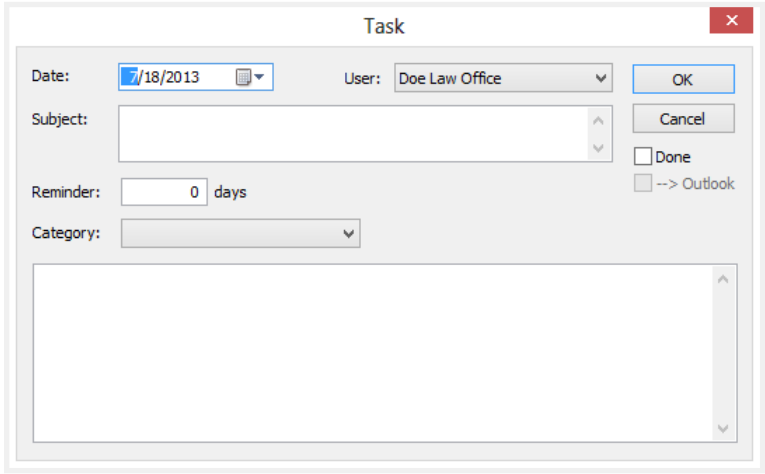
User: The login user is proposed automatically.

Subject: Enter here as much text as you like. This text will be displayed in the Work Screen / File table.

Reminder: Enter the number of days. During this period the Work Screen / File entry is displayed in a warning color.

Done: Activate check box, when the task is finished – color display in the Work Screen / File entry changes automatically.

Outlook If checked then task is automatically entered in Outlook.



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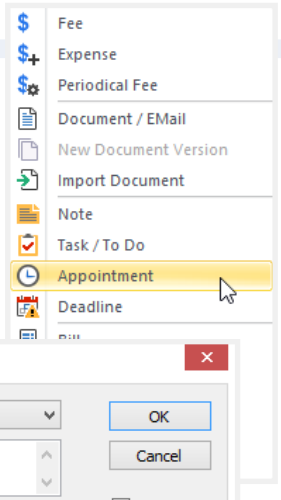
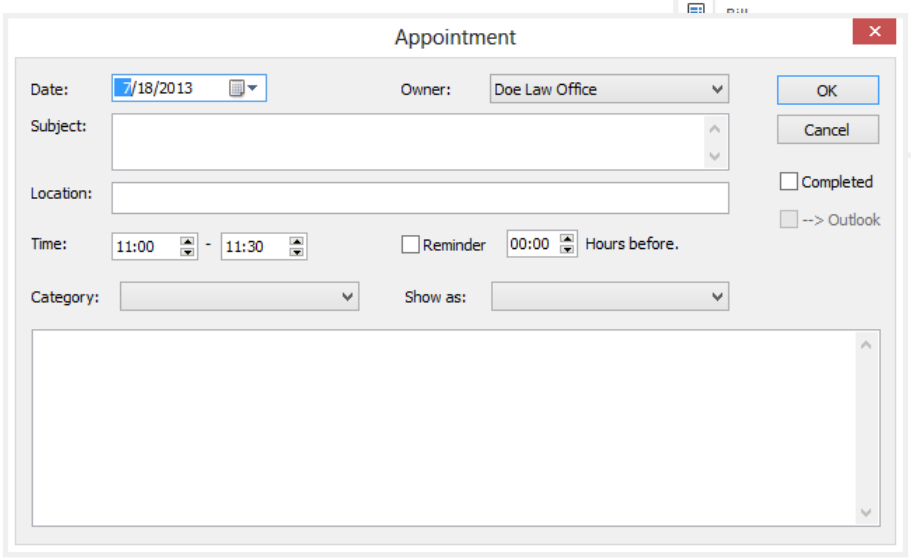
Appointment





Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

User: The login user is proposed automatically.

Subject: Subject

Location: Location

Time: Time of the appointment.

Completed: Activate the check box, when the appointment is done the display color in the Work Screen / File changes automatically.

Reminder: Activate the check box, if you want to be reminded of the appointment.

Hours Enter here how long before the appointment you want to (before app.): be reminded.

Note: Enter here as much text as you like.

Category: Category.

Show as: Show as in Calendar: (Free, Tentative, Busy, Out of Office).

Outlook If checked then appointment is automatically entered in Outlook.

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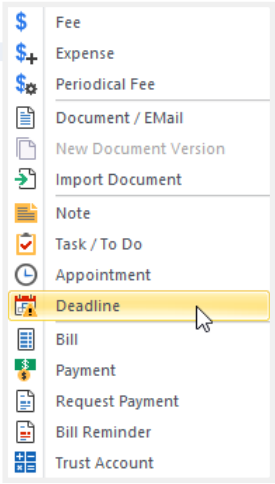
Deadline



Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

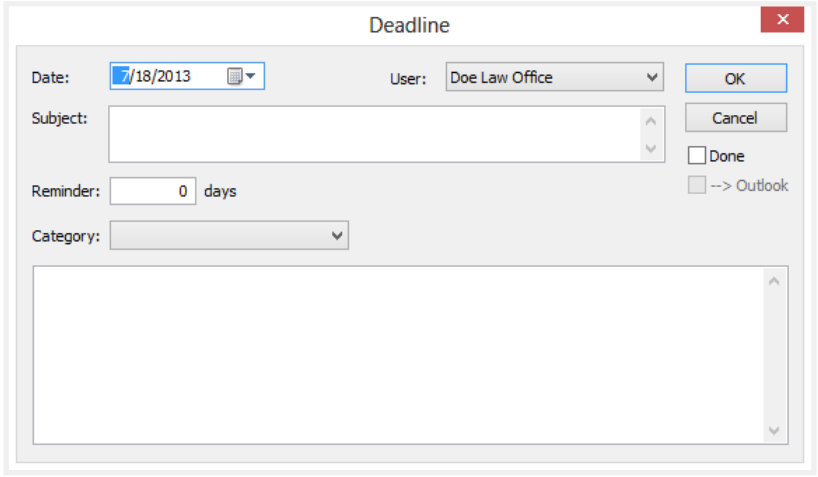
User: The login user is proposed automatically.

Reminder: Enter the number of days. During this period the Work Screen / File entry is displayed in a warning color.

Done: Activate check box, when the deadline is finished – color changes automatically.

Note: Enter here as much text as you like. This text will be displayed in the Work Screen / File table.

Outlook If checked then deadline is automatically entered in Outlook.



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Bill

The program switches automatically to the Invoice overview. This overview summarizes all shows open work, expenses and advance payments entries.

Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

Template: Select the invoice template you want to apply. The standard template, that was chosen for this project, will automatically be displayed

Draft / Bill: Select between Draft and final Bill. The Draft Bill selection creates a document in Word without saving it. The Word document for a definite Bill is saved in the project.

PERIOD: In this field you can define the period during which the work is billed.

RATES: Overview of the persons, who have registered work, including the rates and the totals. You can modify the rates and the amounts.

TAX: In this field you can adapt the Sales Tax or VAT rate for this invoice.

EXPENSES: Enter the expenses total per type of expense.

DOCUMENTS: Show all documents of an existing bill.

CURRENCY: Change the currency (Optional)

EXCHG RATE: Change the currency rate (Optional)

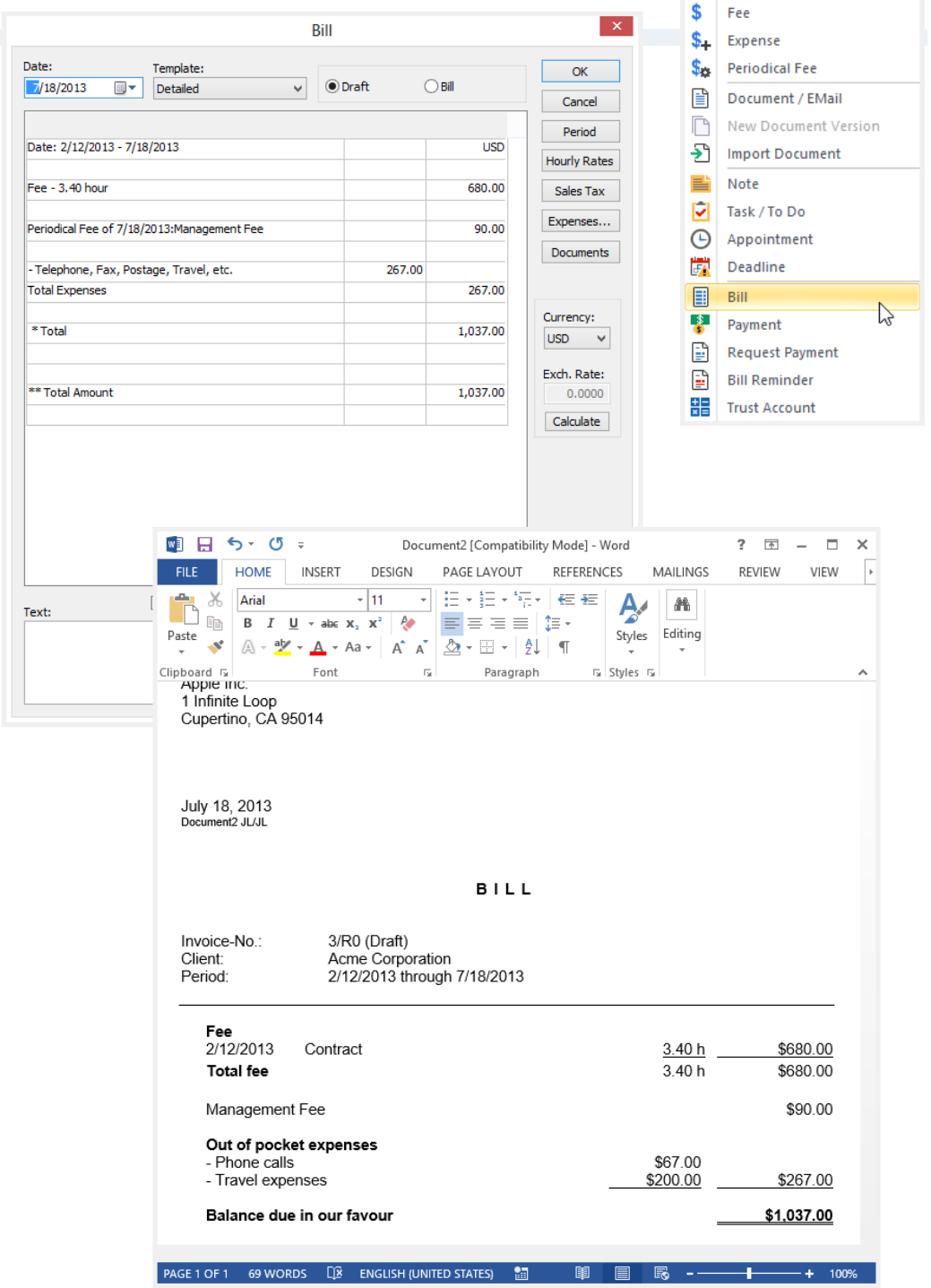
CALCULATE: If you press this button, the system calculates the new amounts and displays them automatically.

Text: Enter here an individual Work Screen / File text.

Include non billable hour: Activate the check box if you want the non-billable hours to be displayed.

Interim Bill: Activate the check box if you want to create an Interim Bill (Option.)

See also "Final" on Page 95



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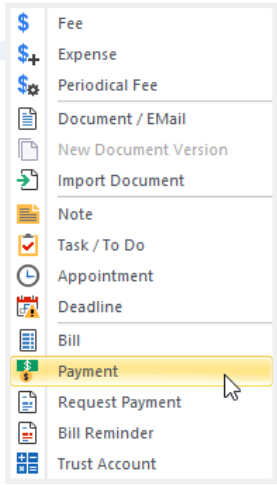
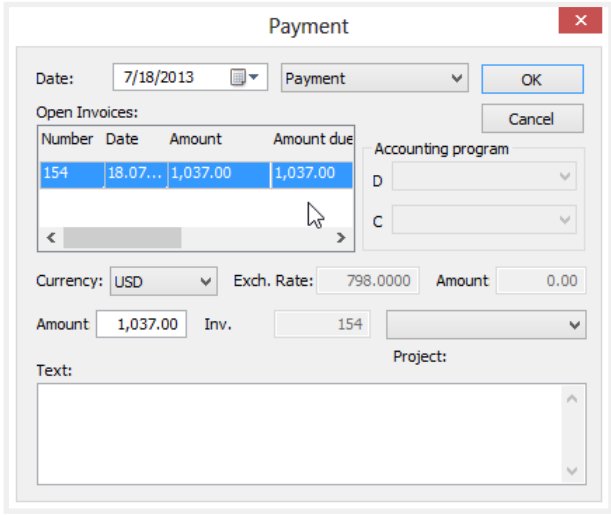
Payment

Payment, a Write Off or an Advance Payment





Date Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

Type Advance Payment / Payment / Write Off

Open Invoices A list of all open bills

Currency Actual currency of the project

Amount Amount

See also: "Payment on Bill" on Page 99

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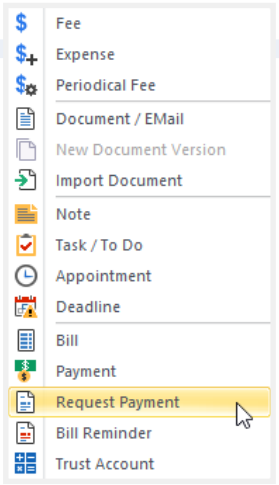
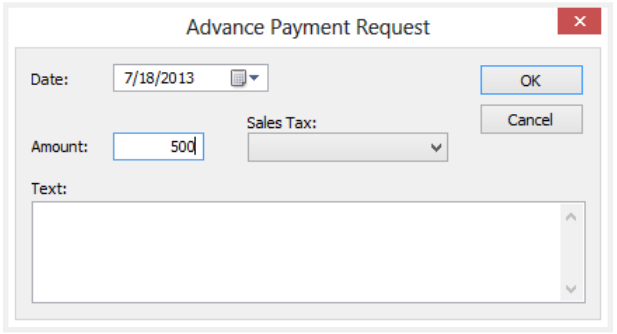
Request Payment





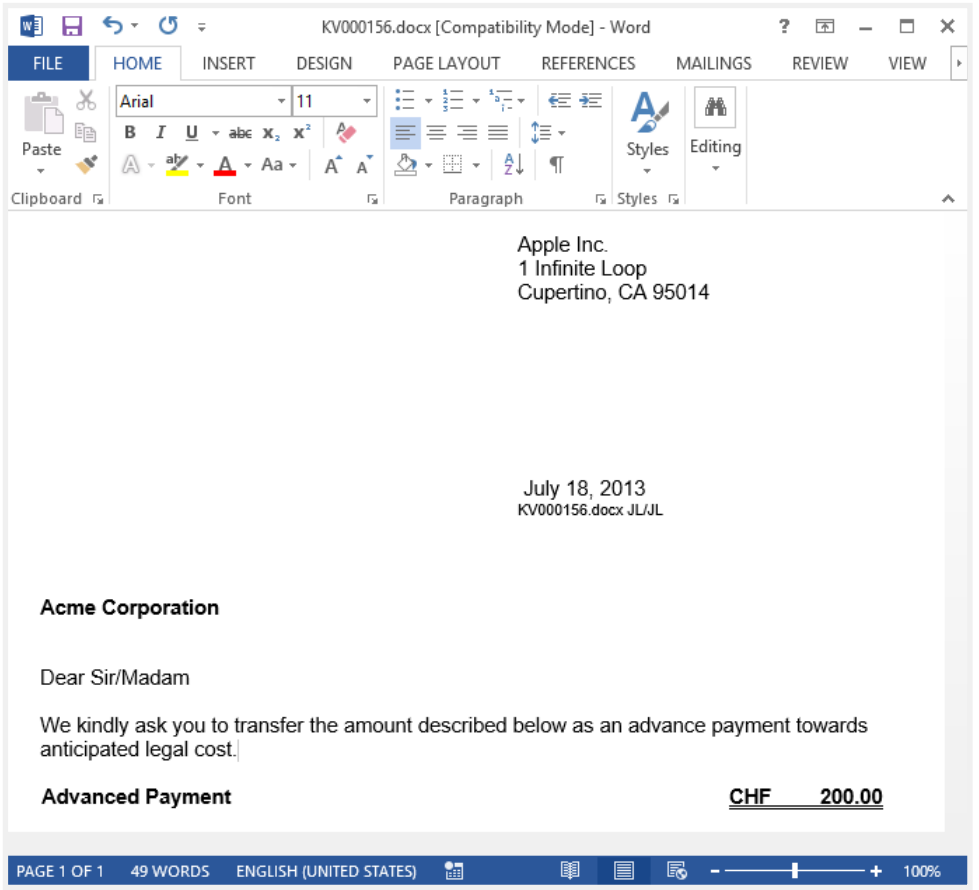
Date: Select the desired Date. Standard display is today's date.

Amount: Insert the amount. If some work has already been recorded, a proposal is displayed. You can overwrite it.

Tax: Select the Tax-rate by clicking on the corresponding field.

Text: Enter in this field any text you want. You can use shortcuts.

The document is now created in Word and can be edited. It is saved automatically and registered in the project



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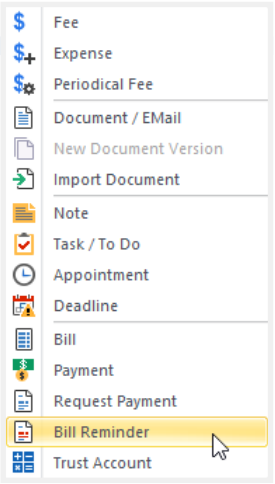
Bill Reminder



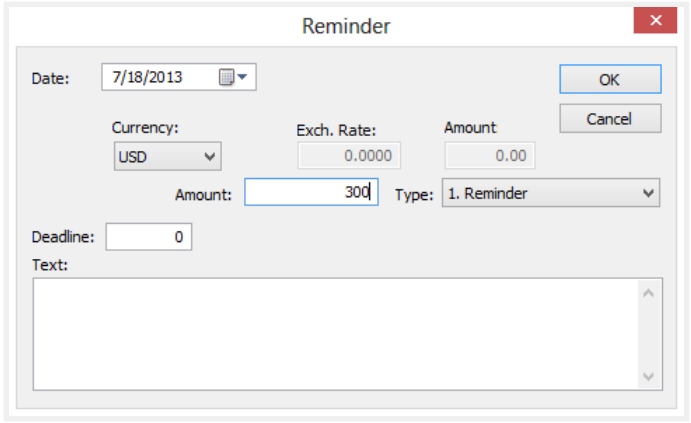
Date: Select the desired Date. Standard display is today's date.

Amount: Enter the amount.

Type: Select the type of reminder by clicking on the field and on the corresponding line (selection possible, if several types have been installed.)

Deadline: Insert the Deadline in the corresponding field.

Text: In the text field you can enter any text you want. You can use shortcuts.



The document is now created in Word and can be edited. It is automatically saved and registered in the project.

See also «Bill Reminder» on Page 101

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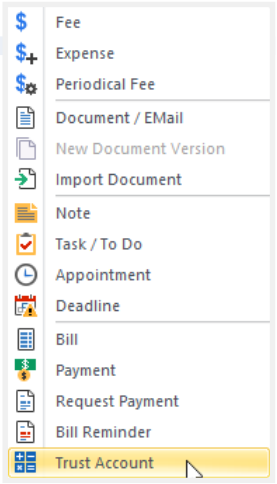
Trust Account

Third Party Funds / Clients' Account Entry (option)

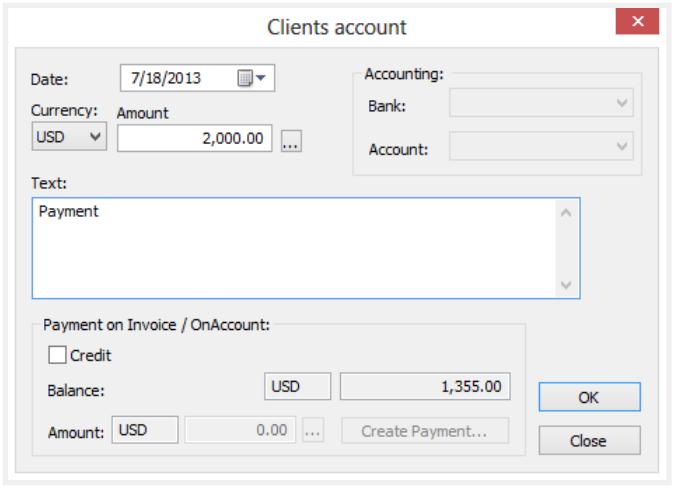


Date: Select the desired Date. Standard display is today's date.

Third Party: Select the currency– standard display is the project currency.

Funds: Enter the amount in the next field. Payment: If you want to enter a payment, you register the amount with a minus-sign in front, e.g. –10'000.00.

Text: In the text field you can enter any text you want. You can use shortcuts.



In the summary window you will always see the actual status

Payment on Invoice / Clients' Account for advance payments

Date: Select the desired Date. Standard display is today's date.

Third Party: Select the currency in the field Total Third Party funds

Funds: The amount is listed in this currency.

Text: In the text field you can enter any text you want. You can use shortcuts.

Amount: Enter the amount in the project currency, it will be automatically converted in the appropriate currency.
If you want to enter the amount in the foreign currency, press the field Currency Adjustment at the right of the field Amount.

Calculate: Enter the amount in the displayed currency and press the tabulator key. The amount will be automatically converted in the system currency and listed in the field Amount. Close with the OK-button.

CREATE PAYMENT: Press the button «Create Payment»- the payment/advance payment is created automatically (see Payments «Payment on Bill» on Page 99)

See also "Trust Account" on Page 102

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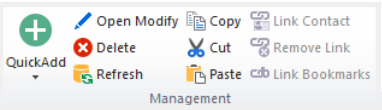
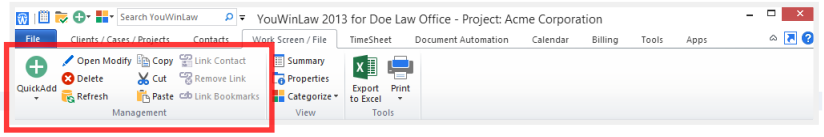
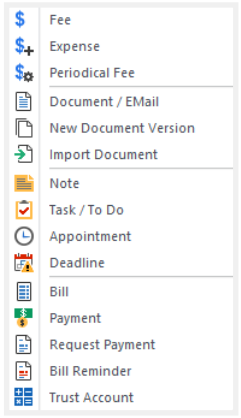


Management



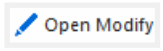
Quick Add

Quickly add an Work Screen / File entry



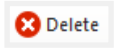
Open Modify

Modify / Open selected Work Screen / File entry



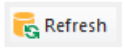
Delete

Delete selected Work Screen / File entry



Refresh

Refresh the Work Screen / File (reread from database)



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Copy

Copy

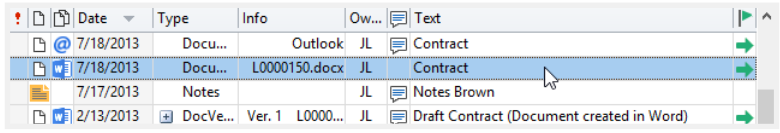
Copy selected entry in Work Screen / File to the windows clip-board

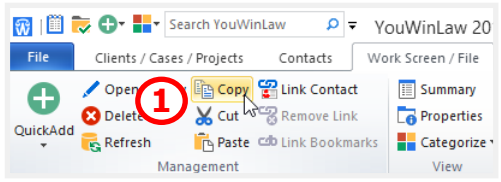
- Entries can be inserted into the same YouWinLaw Project (entry will be duplicated)
- Entries can be copied into another project
- Document Entries can be copied to an outlook e-mail as an attachment. Here, the document name is automatically renamed: Title + unique document number.

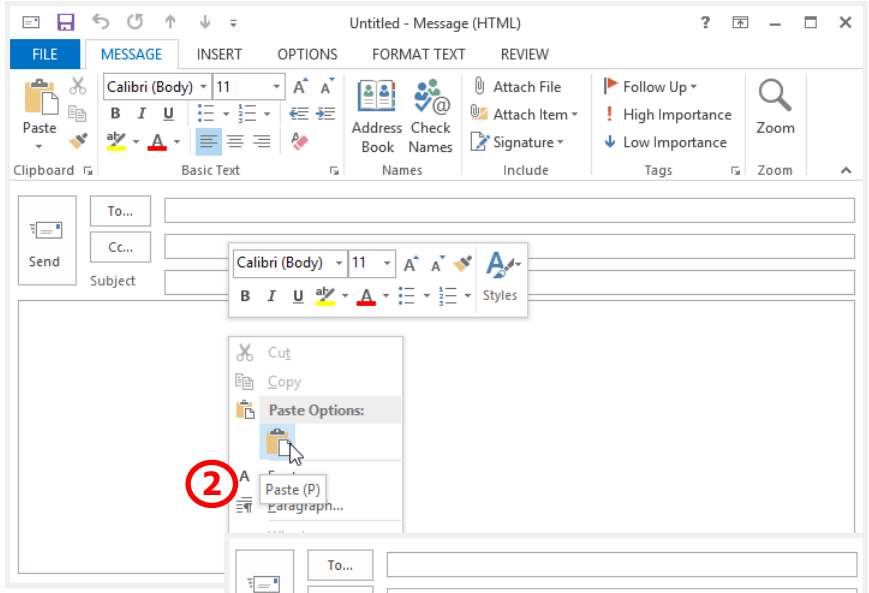
  Select the Document Entry in Work Screen / File

  1. Click on the button «Copy»
  2. In the e-mail within the text window right click to get the context menu and select "Paste"
- You can also copy Document entries to the Windows desk-top or in Windows Explorer (we supports Windows stan-dards).

TIP: You can also do this directly with DRAG & DROP!







Cut

Cut

Cut selected entry in Work Screen / File to the windows clip-board.

In this case the entry is moved.

TIP: You can also do this directly with drag & drop!
(keep "SHIFT" on the keyboard pressed)

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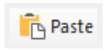
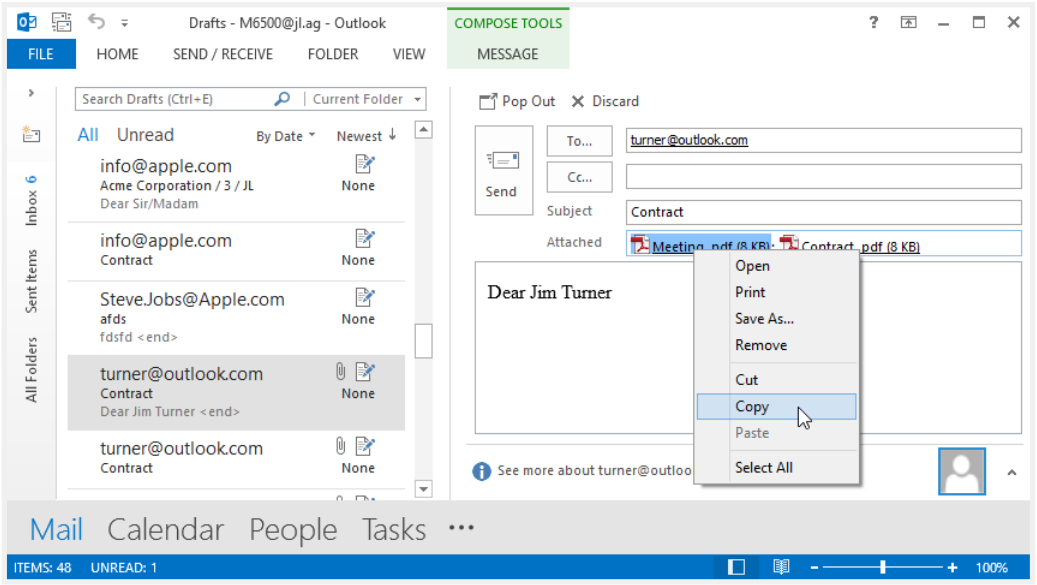
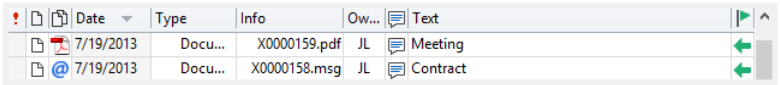
Paste



Paste from the windows clipboard to YouWinLaw activity Log / Journal. Possibilities:

- YouWinLaw entries
- **Documents** in Windows Explorer
- Documents from Windows Desktop
- An **E-mail** from Outlook:
  1. Use the Outlook Menu "Message / Copy" (Context menu doesn't contain any copy command)
  2. In YouWinLaw Work Screen /File use the button "Paste". The entry is inserted in the Work Screen / File table as an e-mail entry
- An **Attachment** from an Outlook EMail:
  1. Right-click on the attachment in Outlook to get the context menu and select "Copy"
  2. In YouWinLaw use the button "Paste". The entry is inserted in the Work Screen / File as a document entry





TIP: You can also do this directly with DRAG & DROP!

The E-mails are stored as separate documents (.msg) in the YouWinLaw Documents Folder (AutoDoc). This means you have a separate copy of these emails in the YouWinLaw Work Screen / File!

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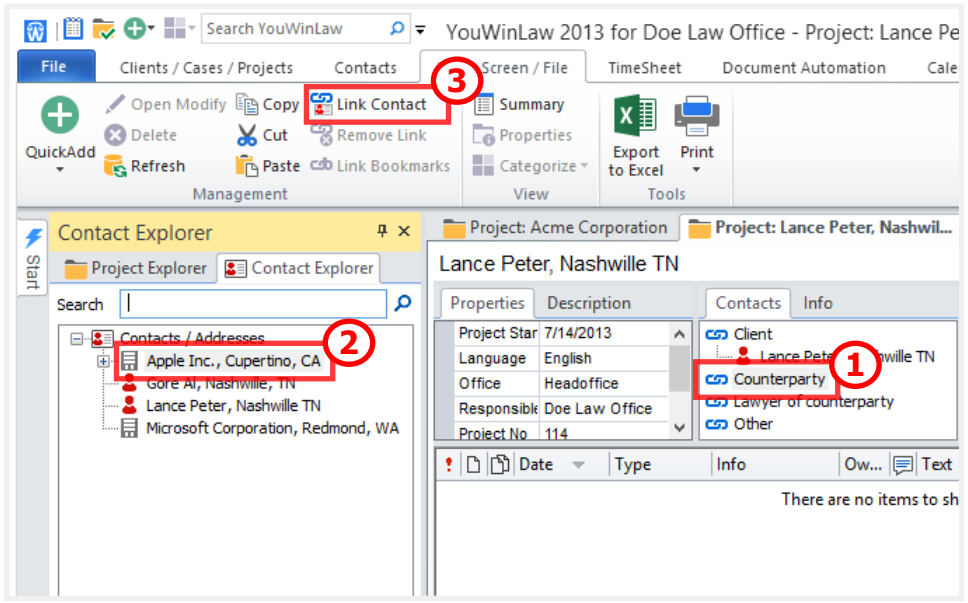
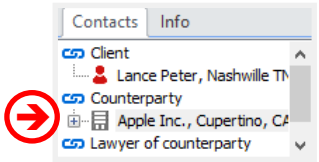
Link Contact

1. Select the link type in the contacts window.
2. Select the desired Contact / Address in the Contact Explorer
3. Click on the button "Link Contact"

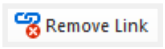
The desired contact / address is now linked with the current project. This link is also visible in the Document Automation Window - see also "Link Contact" on Page 82

TIP: you can do this directly with DRAG & DROP





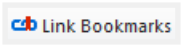
Remove Link



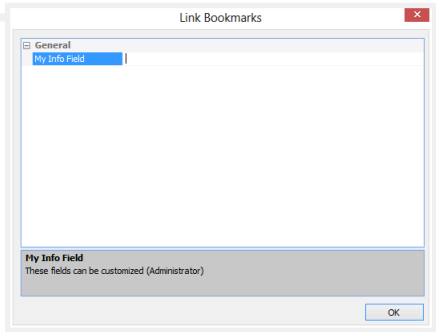
1. Select the desired contact / address in the Contacts window
2. Click on the button "Remove Link"

The contact / address is no longer associated (linked) with the current project.

Link Bookmarks



Here are link bookmarks which are visible only in this link combination.



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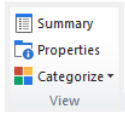
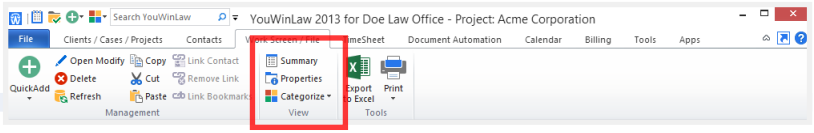
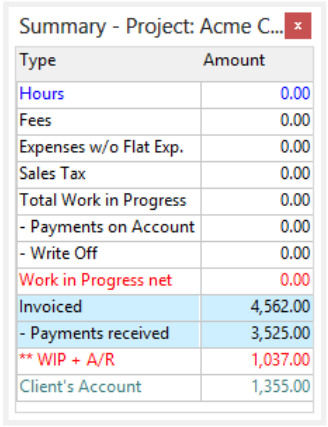


View



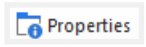
Summary

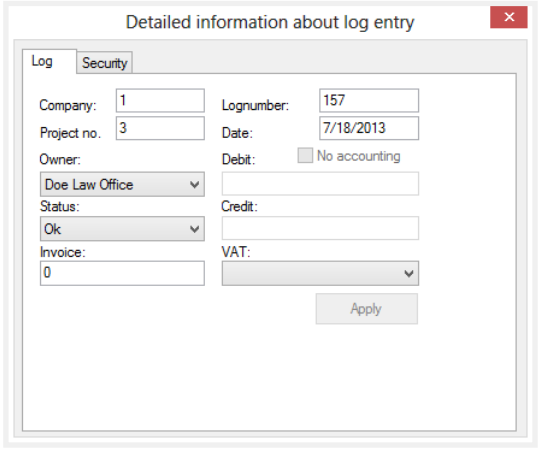
An overview over Hours, Fees, Work in Progress etc.



Properties

Properties of the selected Work Screen / File entry.





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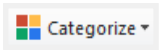
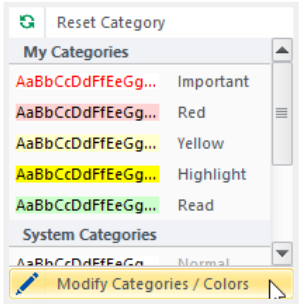
Category

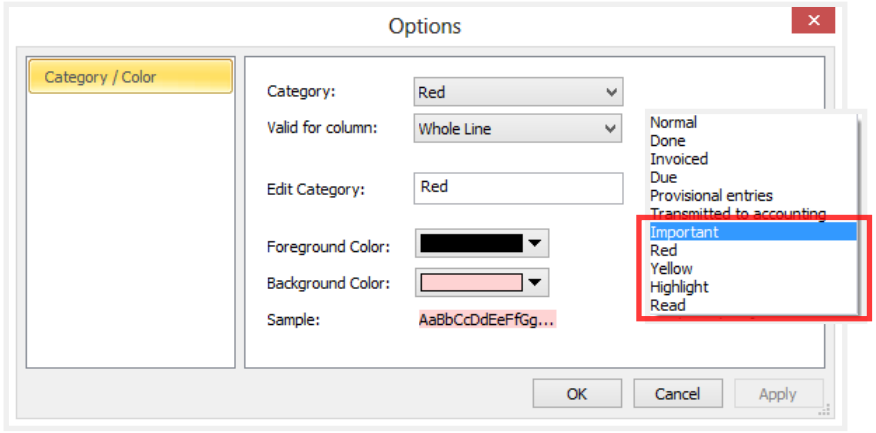


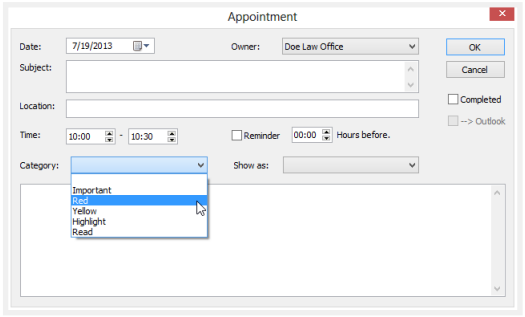
To assign a category to an entry in the journal / log, click on the button "Category". In the Sub Menu, select your category.

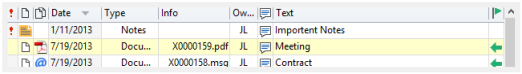
Choose "Modify Category / Color" to change your own categories.

In the dialog "Categories / Color» select the appropriate category. You can not change the category name in certain categories (first 6 are fix), but the last 5 are available.








Date Type Info Ow... Text
1/11/2013 Notes JL Important Notes
7/19/2013 Docu... X0000159.pdf JL Meeting
7/19/2013 Docu... X0000158.msg JL Contract

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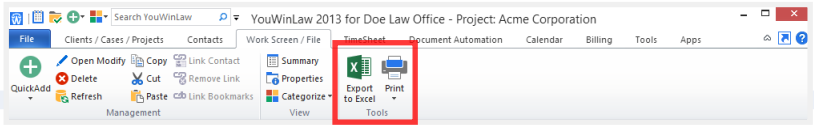
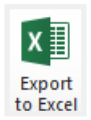


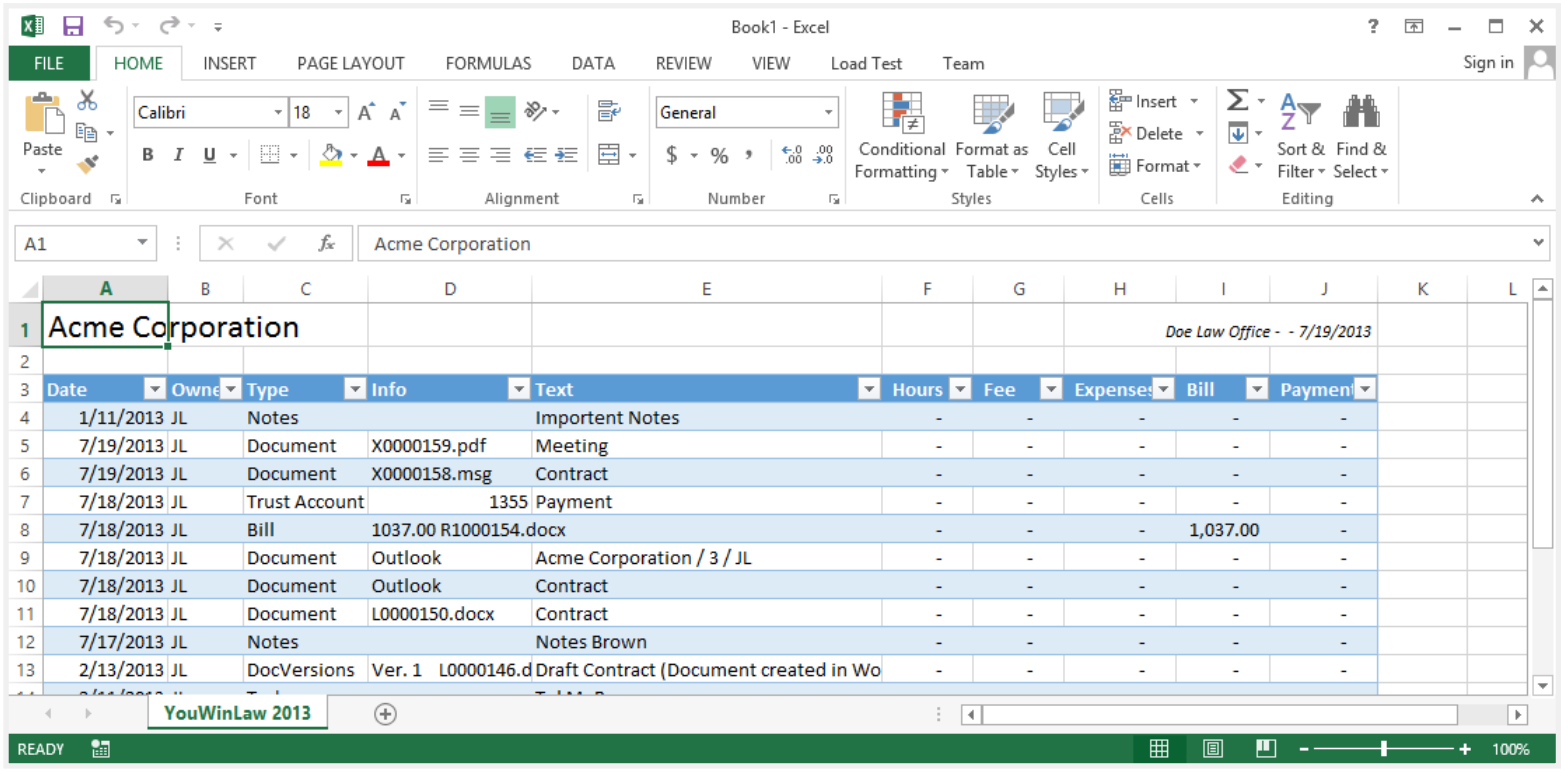
Tools

Export to Excel

Click on the button "Export to Excel" to export the current view in the journal / log to Excel.

Existing filter / search text in Work Screen / File are active.





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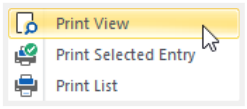
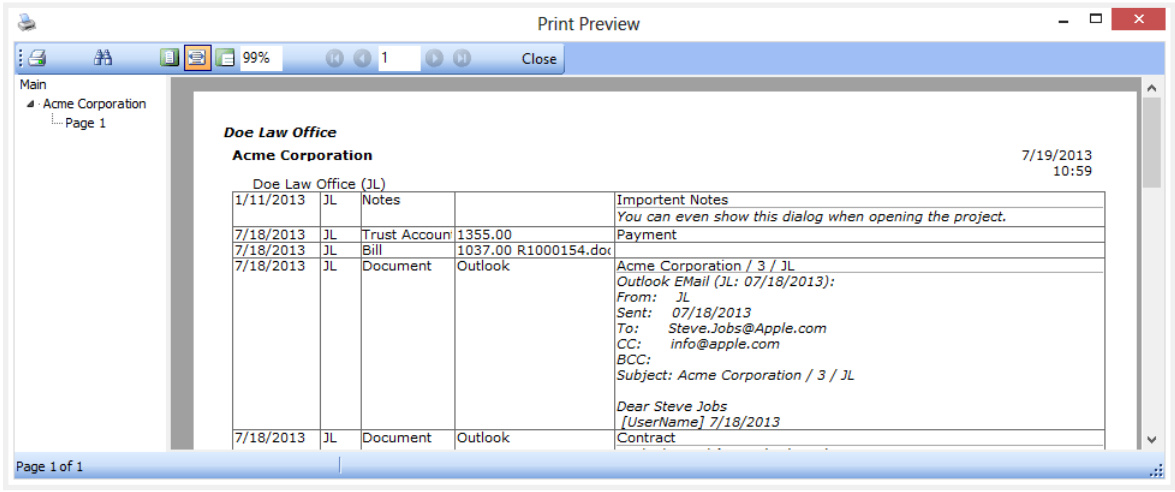
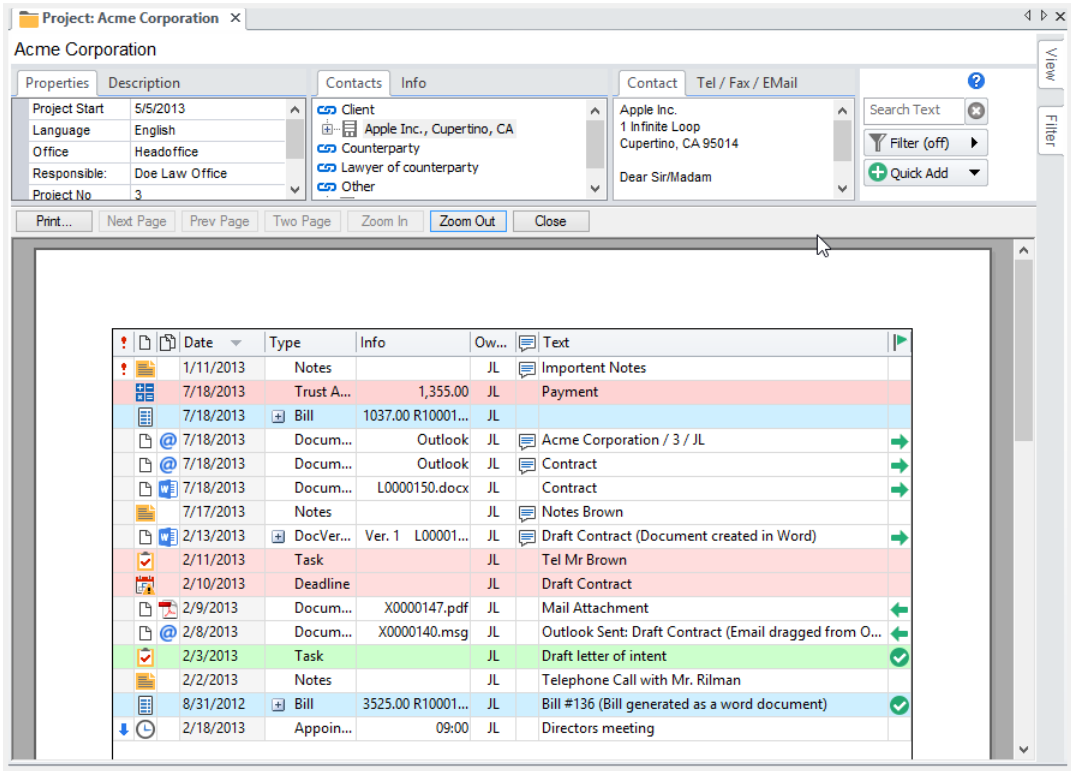
Print

You have different possibilities to print from the Work Screen / File:







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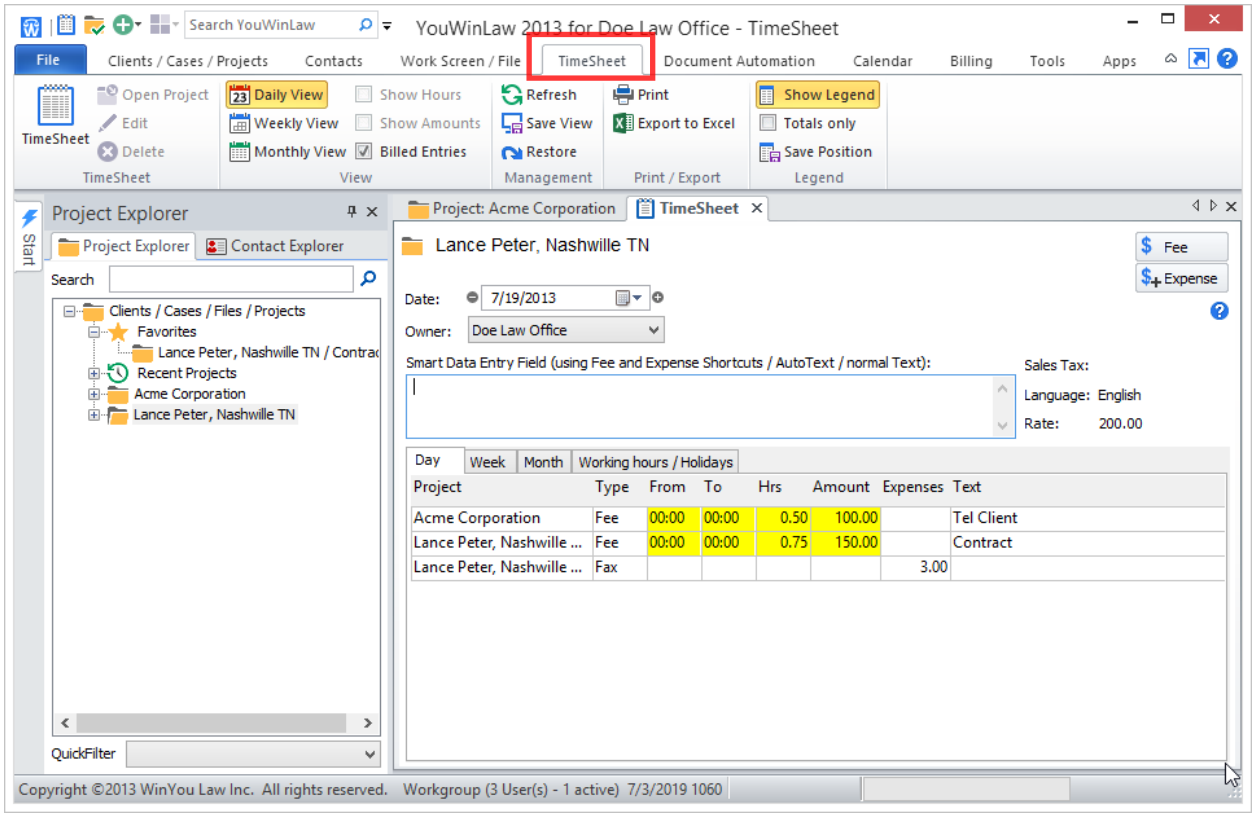
TimeSheet

Introduction

In the TimeSheet you enter your work and expenses as continuous text, just as if you would write it down on paper. You can work with your usual abbreviations (AutoCorrect for Text or Shortcuts for Fees and Expenses) WinYou Law completes the text immediately and integrates it in the selected project. With individual shortcuts, that register several entries in one step, you can win precious time. Of course the classical way of entering Fees and Expenses is also available.

You have different ways of entering your entries. You can enter minutes (e.g. 45m), decimal hours (e.g. 0.5h) or amounts directly (e.g. Total Fee: tf250.00). In the TimeSheet you can enter time periods "from - to" or stop/start your working time. Expenses are entered in amounts, e.g. (5.50co for 5.50 copies).



Overview

Currently selected (highlighted) project in the Project Explorer

TIP: You can toggle (switch) between the Project Explorer (select another project) and the Timesheet with the "**Tab** key"

Data input (different possibilities):

Normal text (full text)

Autotext / Shortcuts

Enter defined Autotext e.g. "sof". This is converted into "study of files.

TimeSheet Shortcuts

Specialized shortcuts for entering fees (hours, minutes, From - To, etc.) or costs (see following page)

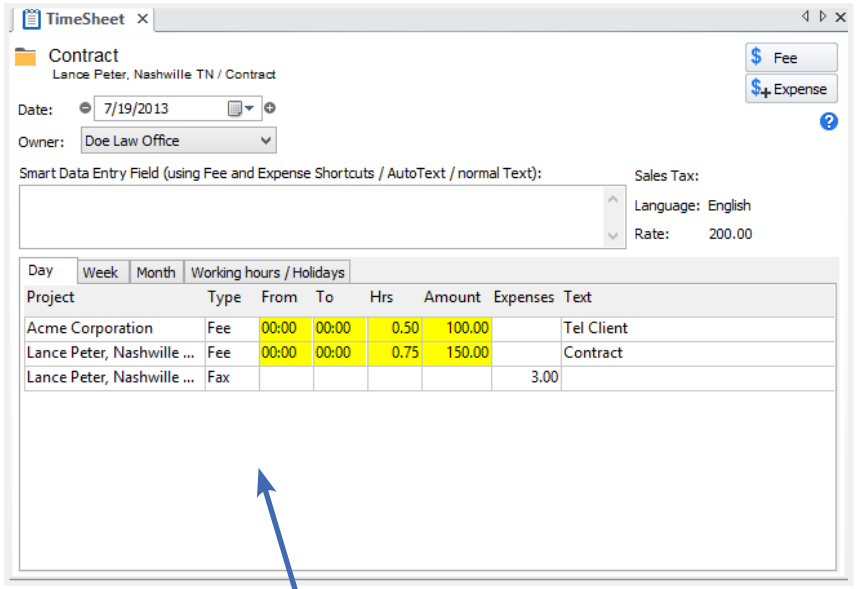
You can combine these 3 different input types

Example:

- "Meeting with Mr Brown 3h"

  Timesheet generates a fee entry 3.0 Hours with the text "Meeting with Mr Brown"
- "sof Contract 25m"

  Timesheet generates a fee entry 25 minutes with the text "Study of files" ("sof" is a autotext for "Study of files")


TimeSheet
Contract
Lance Peter, Nashwille TN / Contract
Fee
Expense
Date: 7/19/2013
Owner: Doe Law Office
Smart Data Entry Field (using Fee and Expense Shortcuts / AutoText / normal Text):
Sales Tax:
Language: English
Rate: 200.00
Day
Week
Month
Working hours / Holidays
Project Type From To Hrs Amount Expenses Text
Acme Corporation Fee 00:00 00:00 0.50 100.00 Tel Client
Lance Peter, Nashwille ... Fee 00:00 00:00 0.75 150.00 Contract
Lance Peter, Nashwille ... Fax 3.00

Enter Fees and Expenses with the traditional dialog

Properties for actual Project

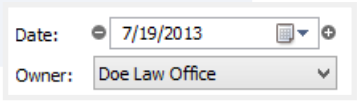
The project **language** is displayed in the Timesheet. When an Autotext is detected, this will be replaced automatically in the project language.

The **Sales Tax** / VAT of the project is displayed in the Timesheet. The rate will automatically be taken in account for fees and expenses.

The **fee rate** is also displayed. If a special fee was defined in a project, this will be displayed.

All entries are shown for selected

- «Date»
- «Owner»



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Introduction to TimeSheet Shortcuts

If WinYou Law TimeSheet recognizes a Text Shortcut, it will automatically insert the corresponding text. You can combine these text Shortcuts with normal text and / or with TimeSheet Shortcuts.

Fee Shortcuts

m Minutes (**45m** = 45 Minutes)

h Decimal Hours (**1.5h** = 1:30 hours)

int Internal Hours without fee and rate (**.5int** = 0:30 hours)

fr Override the automatic Fee Rate (**90fr** = temporarily Fee Rate of $90)

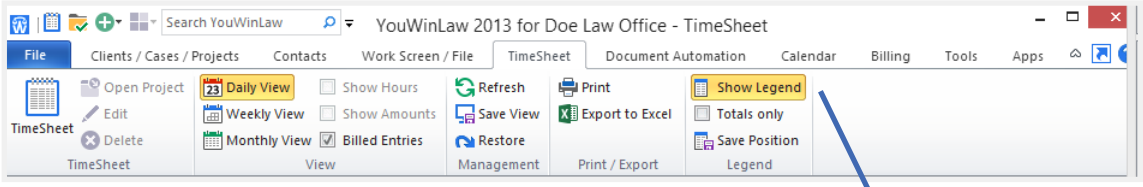
tf Enter Total Fee directly without Hours (**tf400** = Total Fee of $400)

Timer Shortcuts

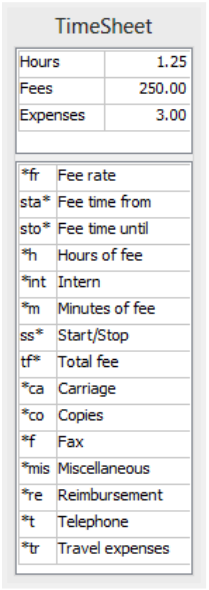
sta Starts the Timer (**sta** = Actual system Time will be entered in the From field) You can continue with text or just save with the ENTER key.
Enter the Start Time (**sta09.20** = 09:20 will be entered in the From field). We are using the military 24 Hrs clock i.e. 01:30pm = 13:30

ss Stops and Starts the Timer: Stops the Timer in the previous Project, starts a new Timer in selected Project. Select a project (A), type sta and press enter in TimeSheet Data Entry (check the From field, of course you can also enter text or text shortcuts) After finishing working with project A you want to work with project B: Select Project B, type ss and press enter (of course you can also enter text or text shortcuts). In project A the timer is stopped, hours are calculated, and the fee entry is updated. In project B a new timer is started (use TimeSheet Shortcut sto to stop the last Timer)

sto Stops the Timer (**sto** = Actual system Time will be entered in the To field) You can continue with text or just save with the ENTER key. Enter the Stop Time (**sto11.45** = 11:45 will be entered in the To field, Fee will be calculated) We are using the military 24 Hrs clock i.e. 01:30pm = 13:30



The YouWinLaw Shortcuts are shown in the Legend



TimeSheet

Hours	1.25
Fees	250.00
Expenses	3.00

*fr	Fee rate
sta*	Fee time from
sto*	Fee time until
*h	Hours of fee
*int	Intern
*m	Minutes of fee
ss*	Start/Stop
tf*	Total fee
*ca	Carriage
*co	Copies
*f	Fax
*mis	Miscellaneous
*re	Reimbursement
*t	Telephone
*tr	Travel expenses

Expenses Shortcuts

ca Carriage (**13ca** = $13 Carriage)

co Copies (**13co** = $13 Copies)

f Fax (**13f** = $13 Fax)

mis Misc. (**13mis** = $13 Miscellaneous Expenses)

re Reimb. (**13re** = $13 Reimbursement)

t Tel. (**13t** = $13 Telephone)

tr Travel (**13tr** = $13 Travel Expenses)

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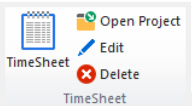
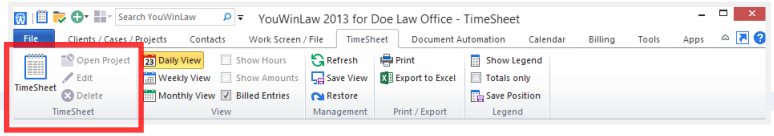
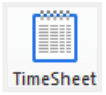


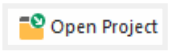
TimeSheet



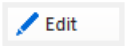
TimeSheet Show TimeSheet



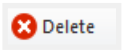
Open Project Selected Project in the TimeSheet list will be opened.



Edit The selected entry from the Timesheet list is read into the data entry window again, and can be modified.



Delete The selected entry from the Timesheet list will be deleted.



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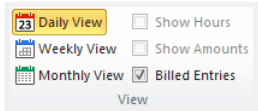
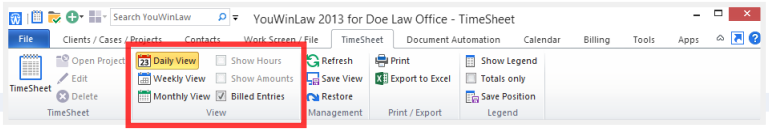
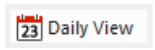


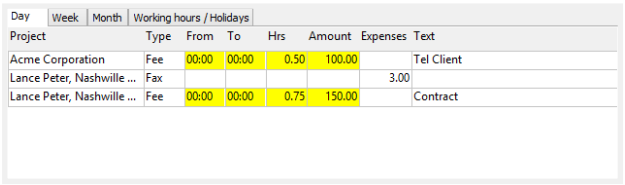
View



Day

Tab «Day» is shown:



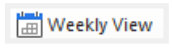


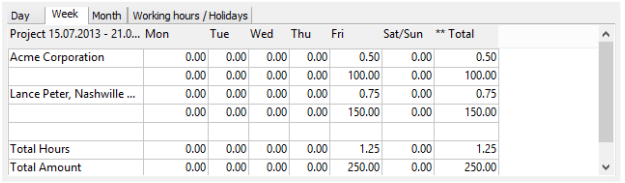
Day | Week | Month | Working hours / Holidays

Project	Type	From	To	Hrs	Amount	Expenses	Text
Acme Corporation	Fee	00:00	00:00	0.50	100.00		Tel Client
Lance Peter, Nashville ...	Fax					3.00	
Lance Peter, Nashville ...	Fee	00:00	00:00	0.75	150.00		Contract

Week

Tab «Week» is shown:



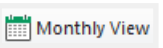


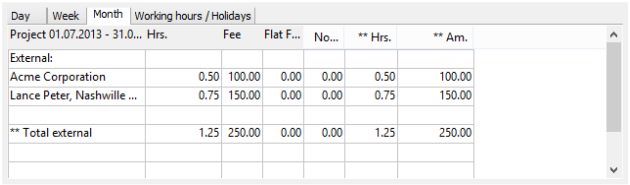
Day | Week | Month | Working hours / Holidays

Project 15.07.2013 - 21.0...	Mon	Tue	Wed	Thu	Fri	Sat/Sun	** Total
Acme Corporation	0.00	0.00	0.00	0.00	0.50	0.00	0.50
	0.00	0.00	0.00	0.00	100.00	0.00	100.00
Lance Peter, Nashville ...	0.00	0.00	0.00	0.00	0.75	0.00	0.75
	0.00	0.00	0.00	0.00	150.00	0.00	150.00
Total Hours	0.00	0.00	0.00	0.00	1.25	0.00	1.25
Total Amount	0.00	0.00	0.00	0.00	250.00	0.00	250.00

Month

Tab «Month» is shown:



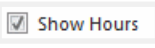


Day | Week | Month | Working hours / Holidays

Project 01.07.2013 - 31.0...	Hrs.	Fee	Flat F...	No...	** Hrs.	** Am.
External:						
Acme Corporation	0.50	100.00	0.00	0.00	0.50	100.00
Lance Peter, Nashville ...	0.75	150.00	0.00	0.00	0.75	150.00
** Total external	1.25	250.00	0.00	0.00	1.25	250.00

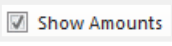
Hours

Shows Hours in the Weekly list



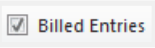
Amounts

Shows Amounts in the Weekly list



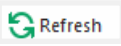
Billed

Shows billed entries in the daily list.



Refresh

Refresh the TimeSheet List (reread from database)



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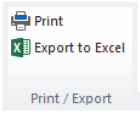
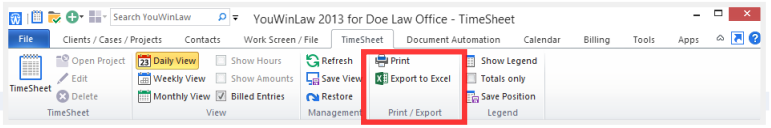
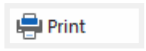


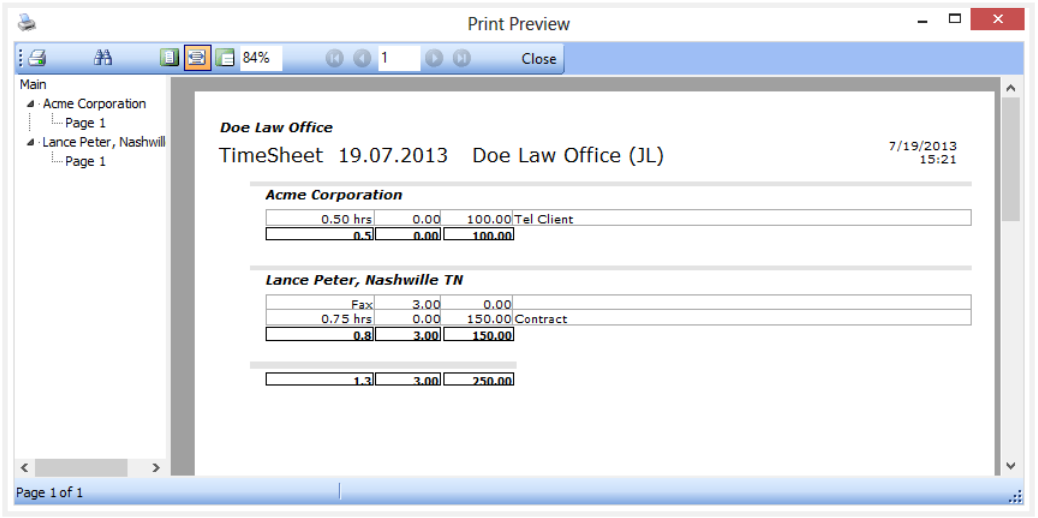
Print / Export



Print

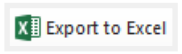
Displayed List in TimeSheet will be printed.

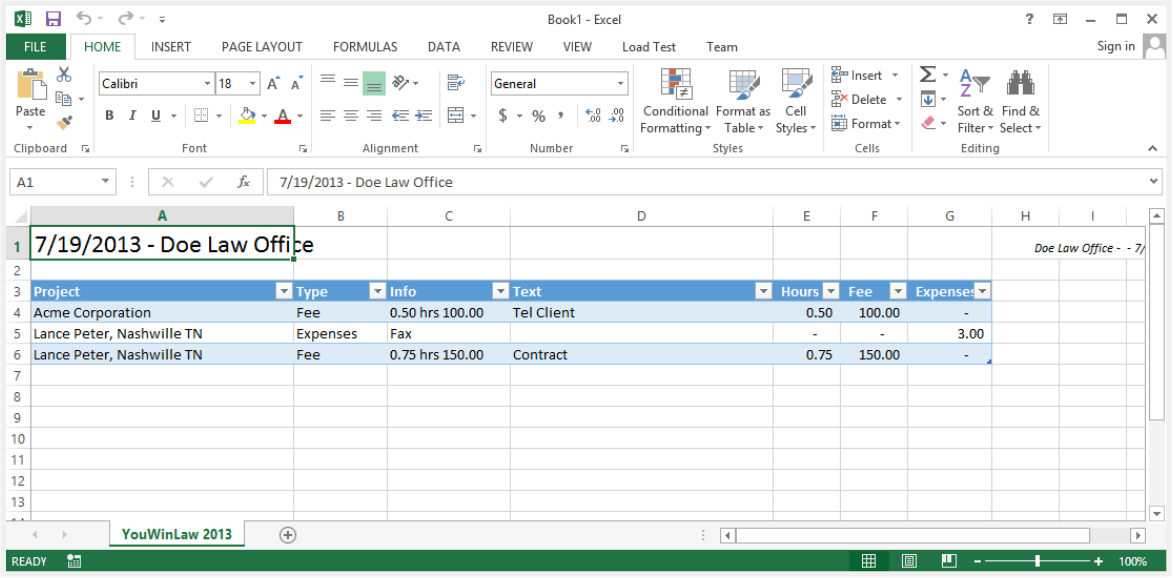




Export to Excel

Displayed List in TimeSheet will be exported to Excel.





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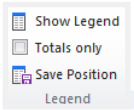
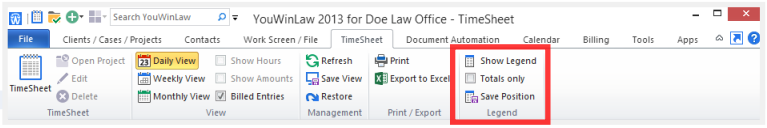
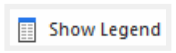


Legend



Show Legend TimeSheet Legend window will be shown.

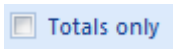


TimeSheet

Hours	1.25
Fees	250.00
Expenses	3.00

*fr	Fee rate
sta*	Fee time from
sto*	Fee time until
*h	Hours of fee
*int	Intern
*m	Minutes of fee
ss*	Start/Stop
tf*	Total fee
*ca	Carriage
*co	Copies
*f	Fax
*mis	Miscellaneous
*re	Reimbursement
*t	Telephone
*tr	Travel expenses

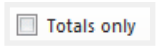
Totals only Only the total amounts will be shown in the Legend.



TimeSheet

Hours	1.25
Fees	250.00
Expenses	3.00

Save Position The position of Legend Window will be saved.



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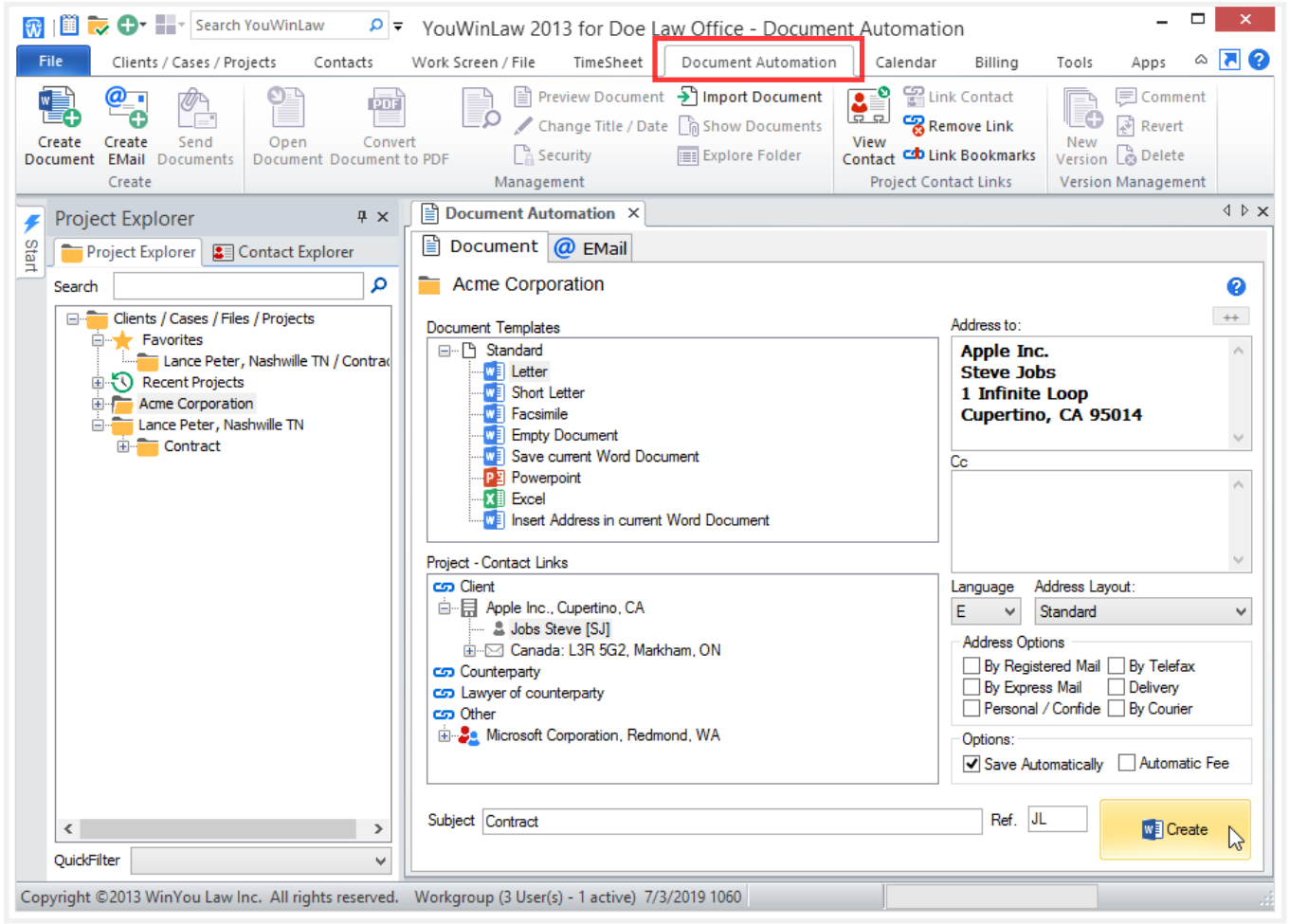
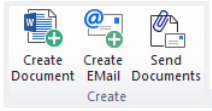
Document Automation

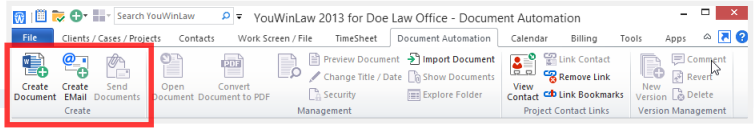
Document / E-mail

The tab «Document Automation» contains all the processing possibilities for documents and e-mails

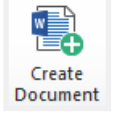




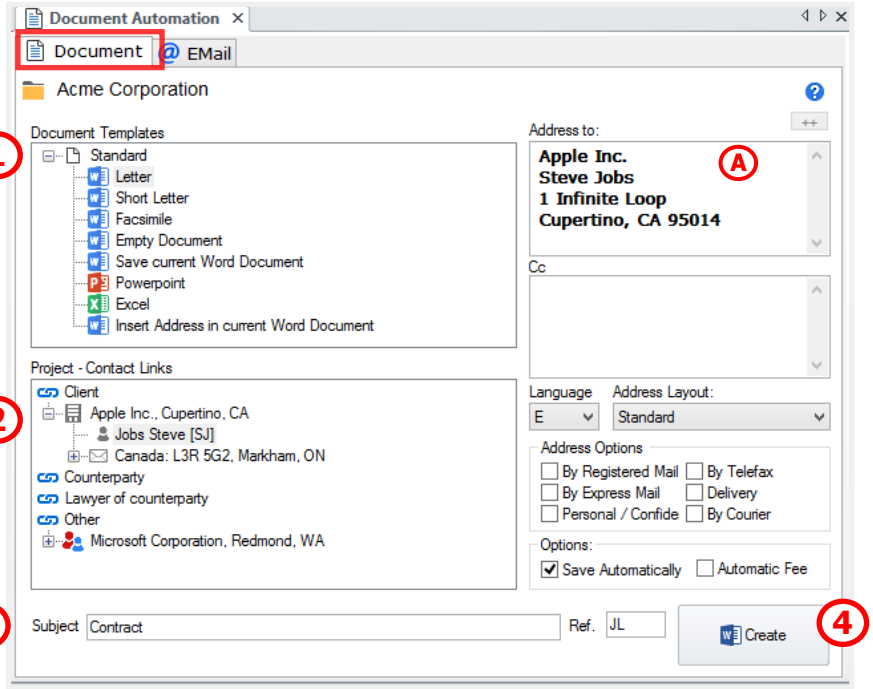
Create



Create Document



In Document Automation select tab Document:



1. Select a document Template

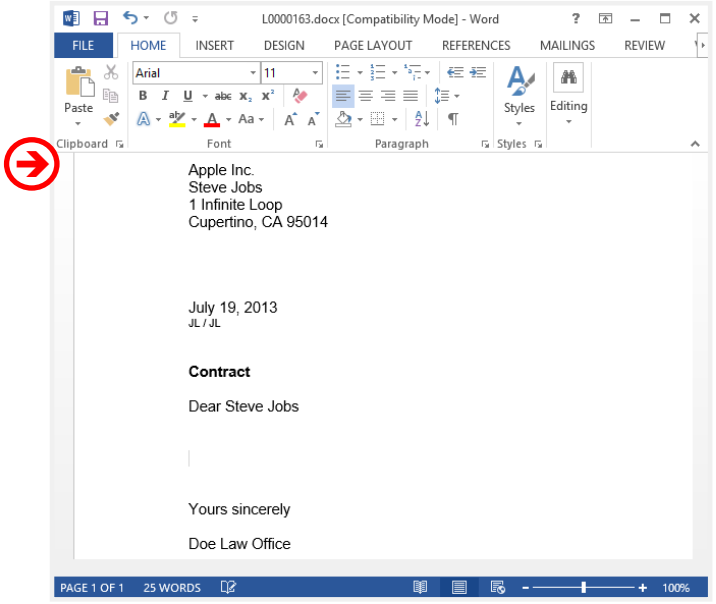
2. Select a Contact / Address

Select the Project Related Address (or as shown, directly the Contact Person). In the Address window you will see how the Address will exactly be shown in the document. You can also drag a contact from the Contact Explorer directly in the address window (A) (Drag & Drop)

3. Title / Subject

The Title will be shown in the Work Screen / File Document Entry for the project. The Subject will be shown in the document

4. Click on the button "Create" to create the document



- Word opens with the corresponding template as a new document
- All bookmarks in the template are filled in (address, subject etc.)
- The document is saved automatically
- It adds a corresponding entry in the Work Screen / File table
- If «Automatic Fee» is enabled, a fee will automatically be generated

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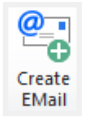
Create E-mail

In Document Automation select tab E-mail:

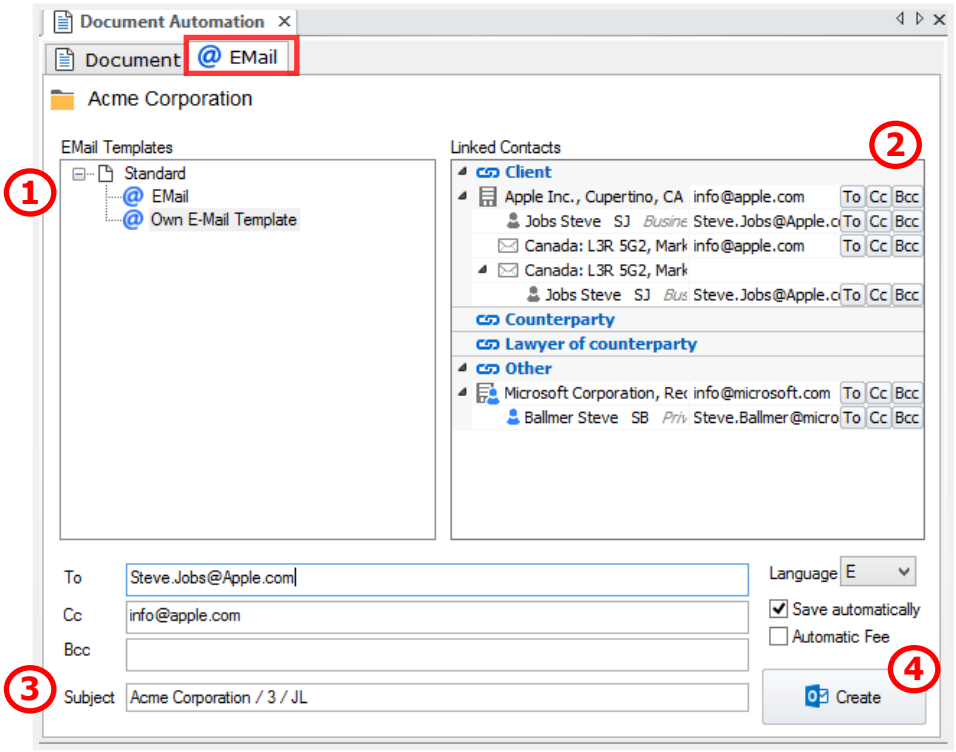


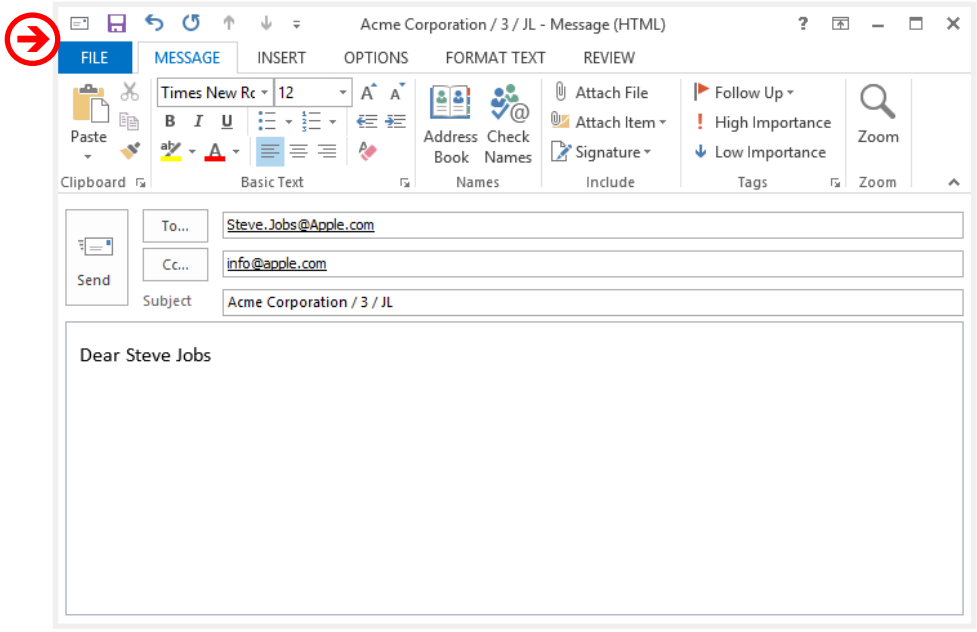
1. Select an e-mail template

2. Select one or more e-mail addresses. Use the [To], [Cc] and [Bcc] buttons to add the e-mail addresses.

3. Subject
   Subject can be automatically created with Bookmarks in the e-mail template
   The Subject will be shown in the Work Screen / File Document Entry for the project and will also be inserted in the e-mail.

4. Click on the button «Create»





- Outlook opens with the corresponding template as a new e-mail
- All bookmarks in the template are filled in (address, subject etc.)
- The e-mail is saved automatically (in Outlook)
- It adds a corresponding entry in the Work Screen / File table
- If «Automatic Fee» is enabled, a fee will automatically be generated

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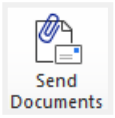
Send Documents



1. Select one or more Documents in the Work Screen / File table that you want to send with Email

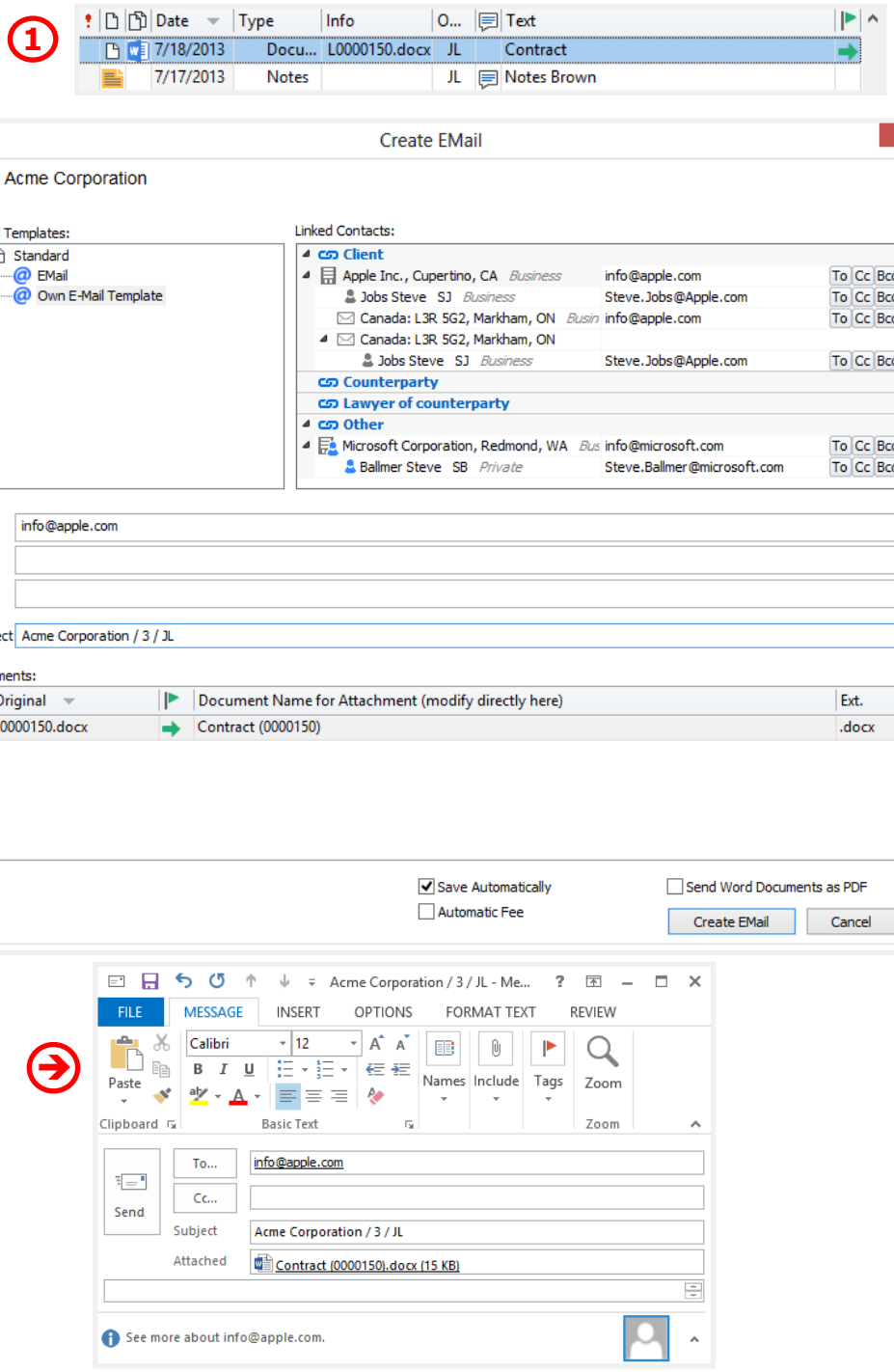
2. Click on "Send Documents"
The dialog «Create EMail» opens

3. Select e-mail template

4. Select Contact / Address
Use [To], [Cc] and [Bcc] buttons to assign the E.Mail Addresses to the respective fields (To, Cc, Bcc)

- You can change the document name
- Send word documents as PDF:
  You can convert the documents automatically to PDF.

4. Click on the button «Create EMail»
The Outlook email dialog opens, email addresses, subject, title, other Bookmarks and all attachments are automatically inserted.
Here you can assign more email addresses from your Outlook address book.



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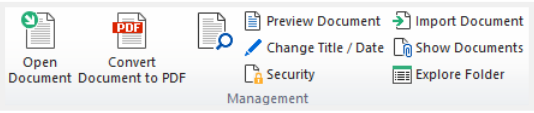
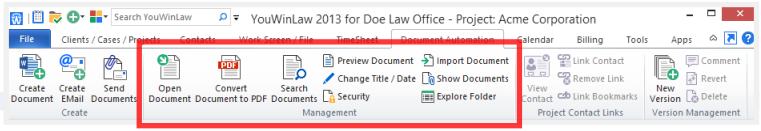
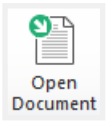


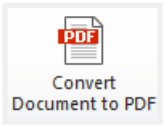
Management



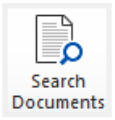
Open Document The selected document is opened with the appropriate program.

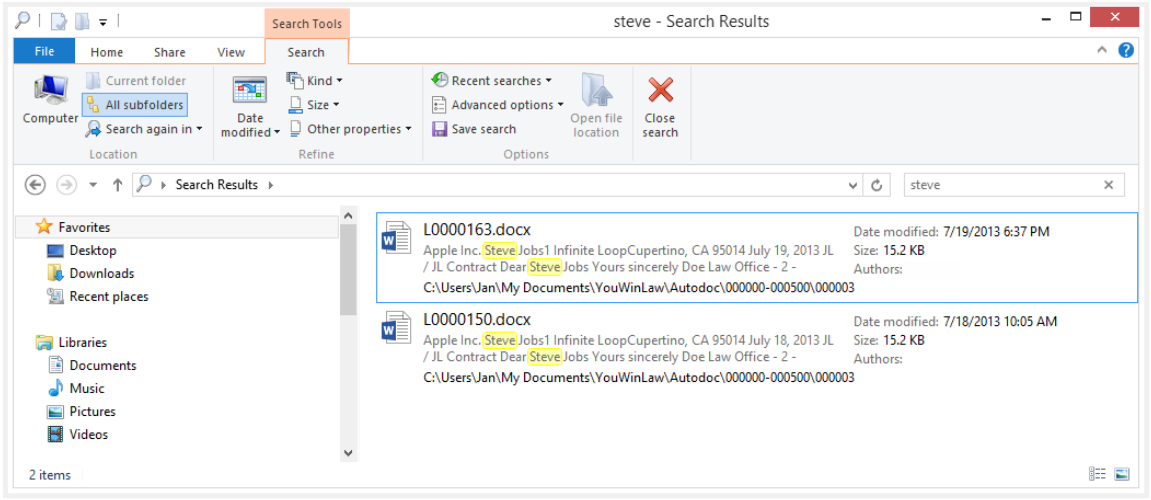


Convert Document to PDF Convert opened Word Document in a PDF Format



Search Documents Here you can search all the documents in the current project with full text search





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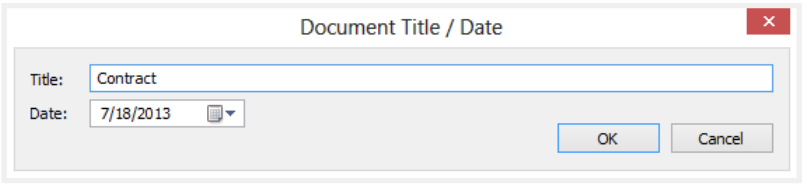
Preview Document

Preview Document

Change Title / Date

Modify the document title of the selected document

Change Title / Date



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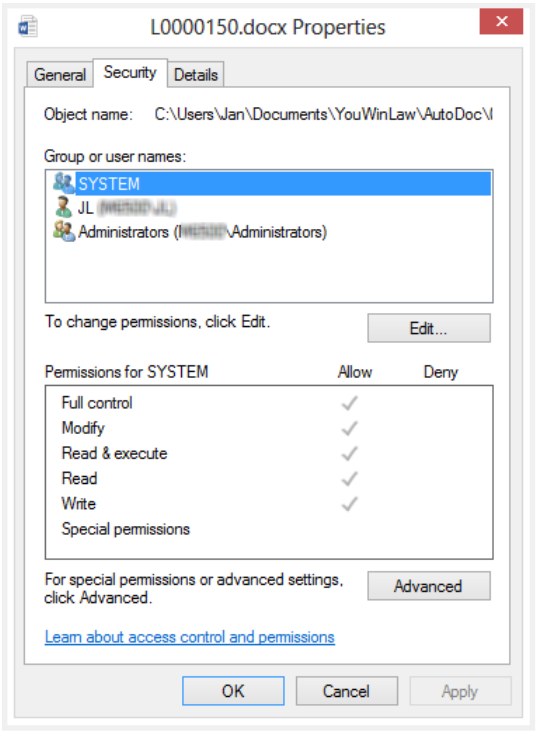
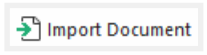
Security

Tab Security from the properties dialog

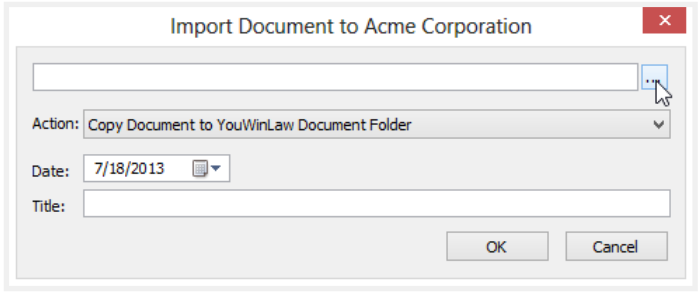


Import Document

Import or **link** external documents



Import via Dialog



TIP: With DRAG & DROP directly in Work Screen / File window (from an e-mail, e-mail attachment, windows explorer, desktop etc.)

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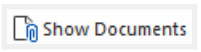
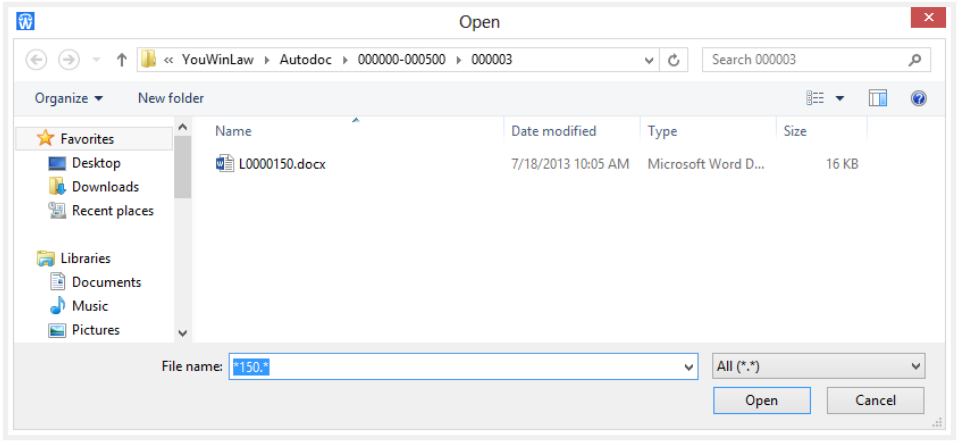
Show Documents

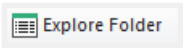


Select one or more documents in the Work Screen / File table and click on "Show Document". YouWinLaw shows the physical documents in an Open dialog of Windows. From here you can copy or move (with drag and drop) to other locations.

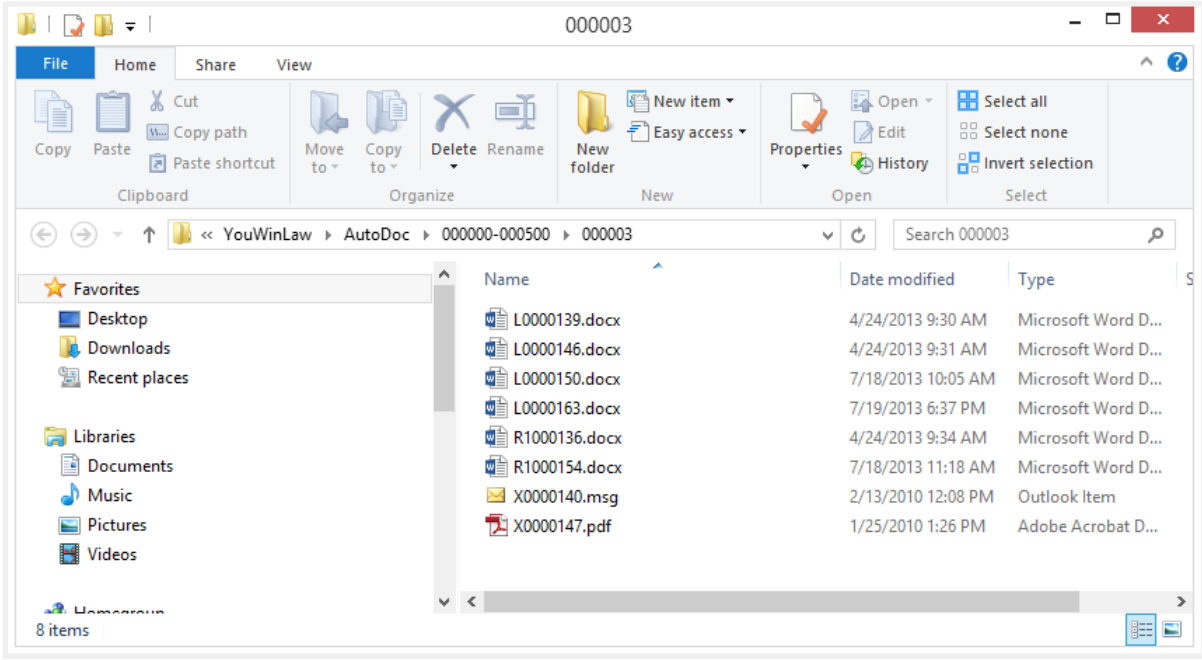
TIP: DRAG & DROP from here to an e-mail



Explore Folder



YouWinLaw opens the Windows Explorer with the AutoDoc Folder for the selected Project.



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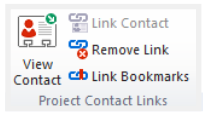
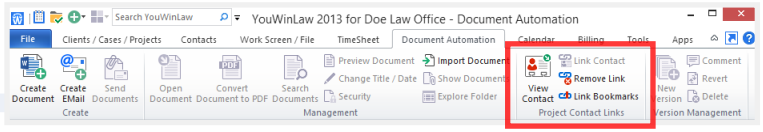
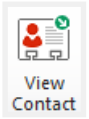


Project Contact Links



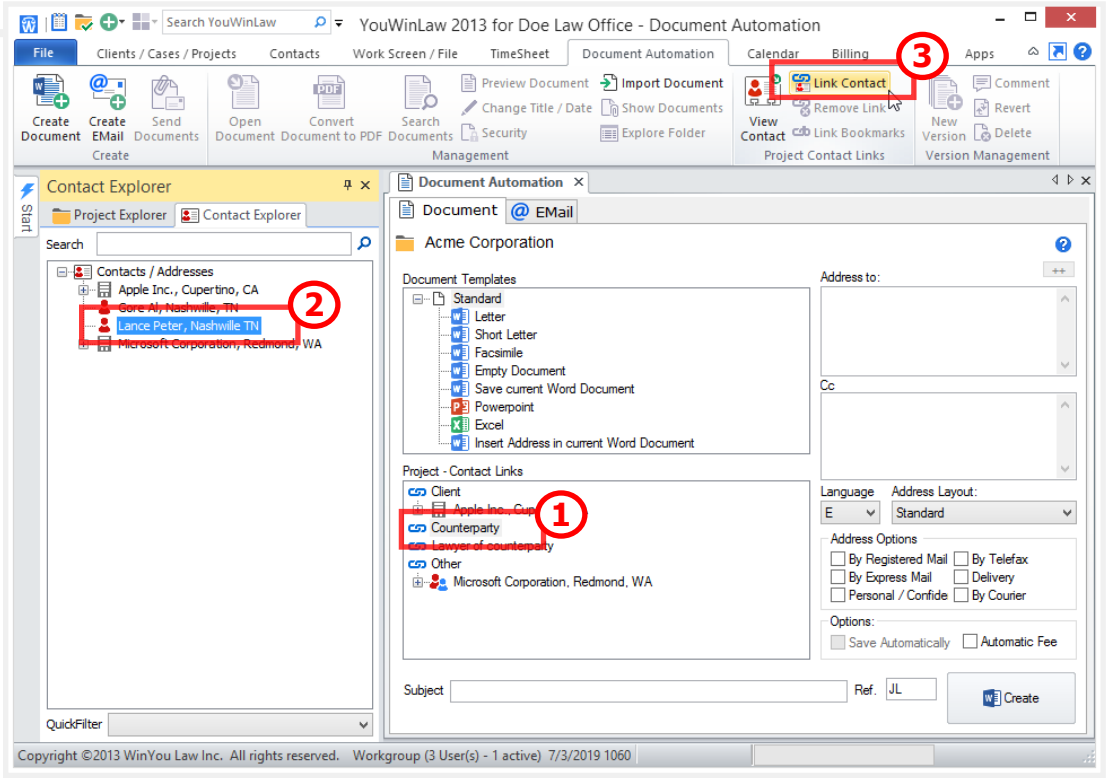
View Contact

Selected Contact / Address will be opened.



Link Contact

1. Select the link type in the Project - Contact Links window.
2. Select the desired Contact / Address in the Contact Explorer
3. Click on the button "Link Contact"



The desired contact / address is now linked with the current project. This link is also visible in the Contacts window in Work Screen / File

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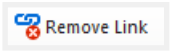
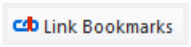
Remove Link



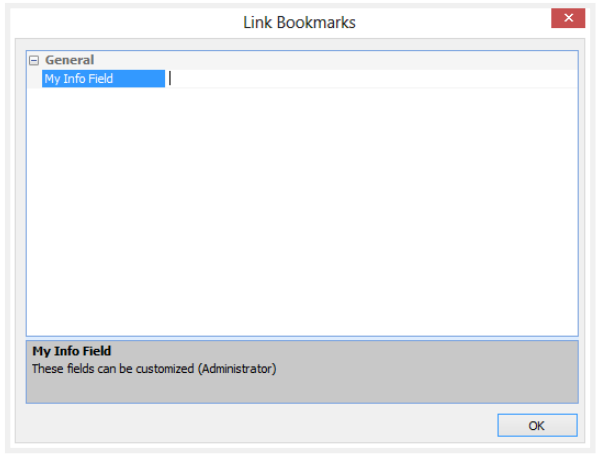
1. Select the desired contact / address in the Contacts window
2. Click on the button "Remove Link"

The contact / address is no longer associated (linked) with the current project.

Link Bookmarks



Here are link bookmarks which are visible only in this link combination.



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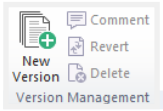
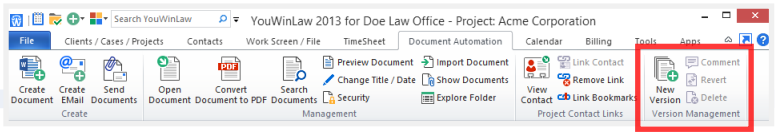
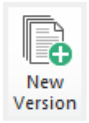


Version Management



New Version

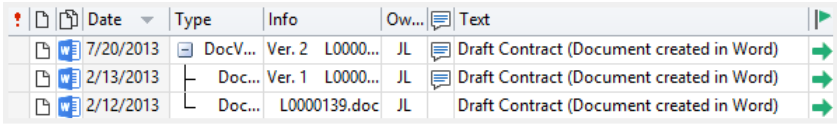


Here you can create new versions of a document.

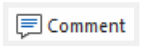
From the selected Document, a new version will be generated. These are continuously (Ver 2, 3, etc.) renamed, the title remains the same.

In the comment, you can add any text or comments to the new version.

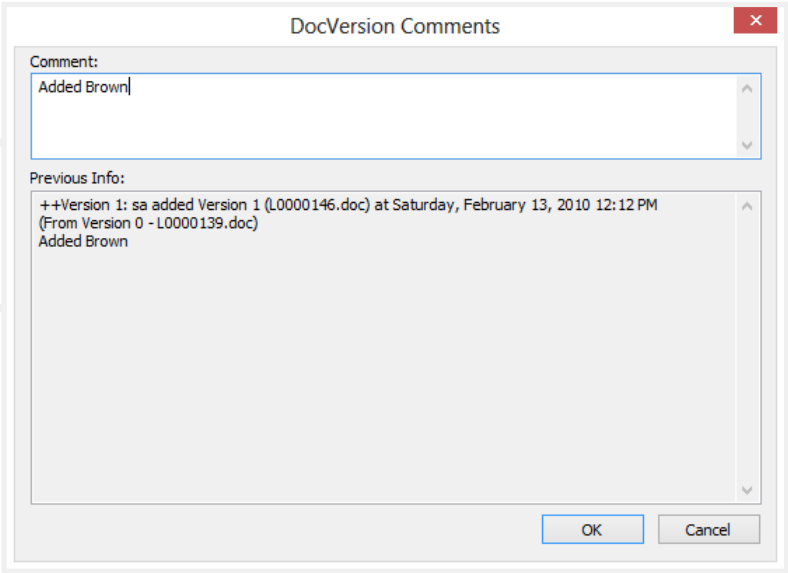
In the Work Screen / File table, the latest version of a document is displayed, the previous versions are visible when you click the sign [+].



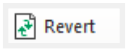
Comment



Modify any comments for selected version.

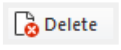


Revert



Revert any selected version to the newest version.

Delete



The selected document will be deleted.

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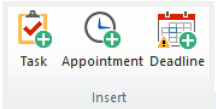
Calendar

Introduction

There are two main windows: a calendar view, and a list of tasks, appointments and deadlines.



Insert

Task / To Do

Date: Select the desired Date

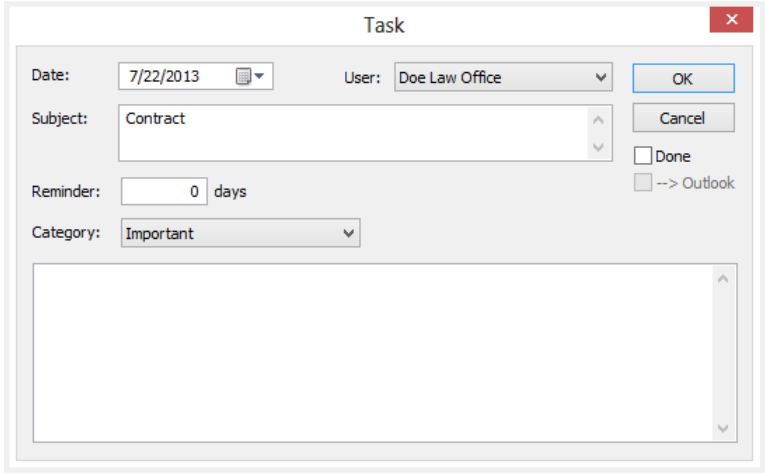
User: The login user is proposed automatically.

Reminder: Enter the number of days. During this period the Work Screen / File entry is displayed in a warning color.

Done: Activate check box, when the task is finished – color display in the Work Screen / File changes automatically.

Note: Enter here as much text as you like. This text will be displayed in the Work Screen / File.

Outlook If checked then task is automatically entered in Outlook.



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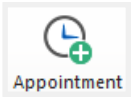
Appointment



Date: Select the desired Date

User: The login user is proposed automatically.

Subject: Subject

Location: Location

Time: Time of the appointment.

Completed: Activate the check box, when the appointment is done the display color in the Work Screen / File changes automatically.

Reminder: Activate the check box, if you want to be reminded of the appointment.

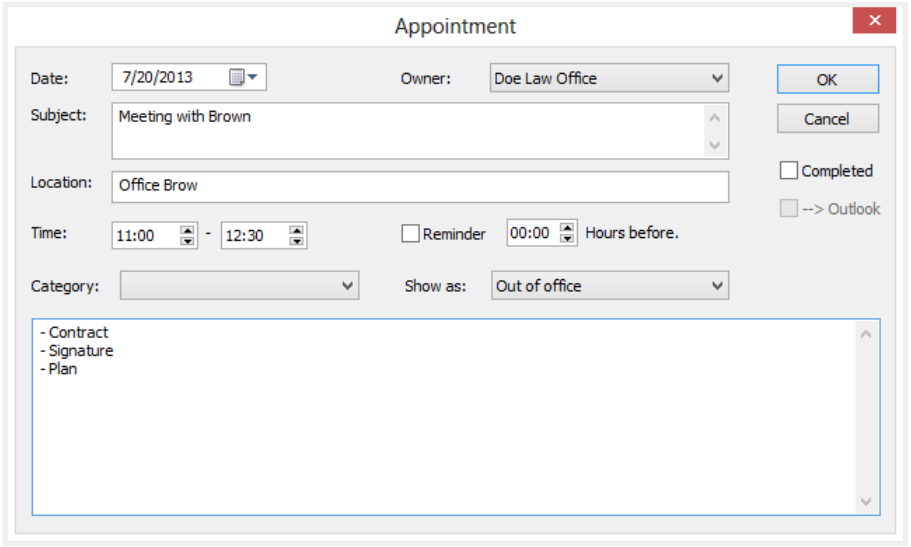
Hours Enter here how long before the appointment you want to (before app.): be reminded.

Note: Enter here as much text as you like.

Category: Category.

Show as: Show as in Calendar: (Free, Tentative, Busy, Out of Office).

Outlook If checked then appointment is automatically entered in Outlook.



Deadline

Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

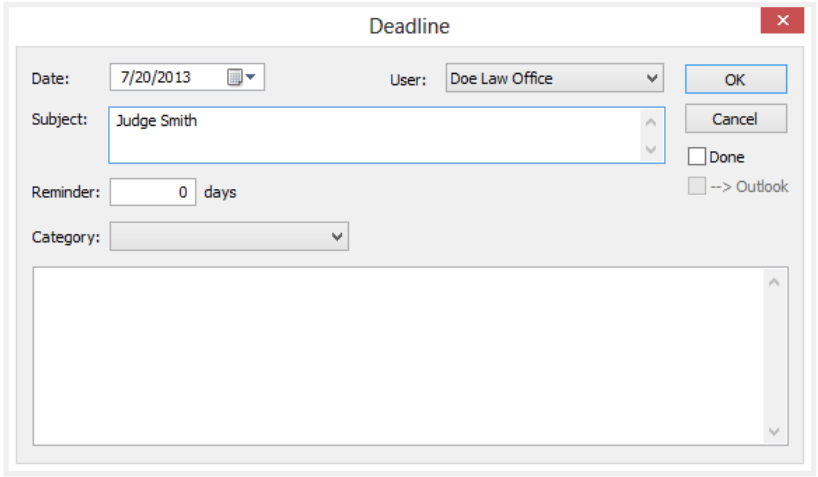
User: The login user is proposed automatically.

Reminder: Enter the number of days. During this period the Work Screen / File entry is displayed in a warning color.

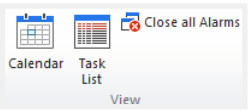
Done: Activate check box, when the deadline is finished – color display in the Work Screen / File changes automatically.

Note: Enter here as much text as you like. This text will be displayed in the Work Screen / File.

Outlook If checked then deadline is automatically entered in Outlook.



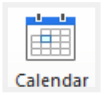
Copyright ©WinYou Law Inc.



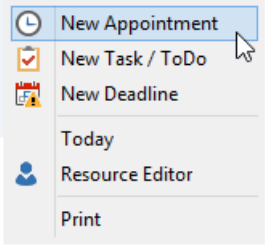
View

Calendar

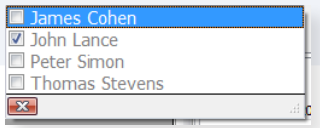
Overview Calendar



Insert:
Select the desired time section, select "Insert" and the corresponding appointment / task / deadline dialog is shown



User / Owner:
You can select one or more users simultaneously and view their entries.

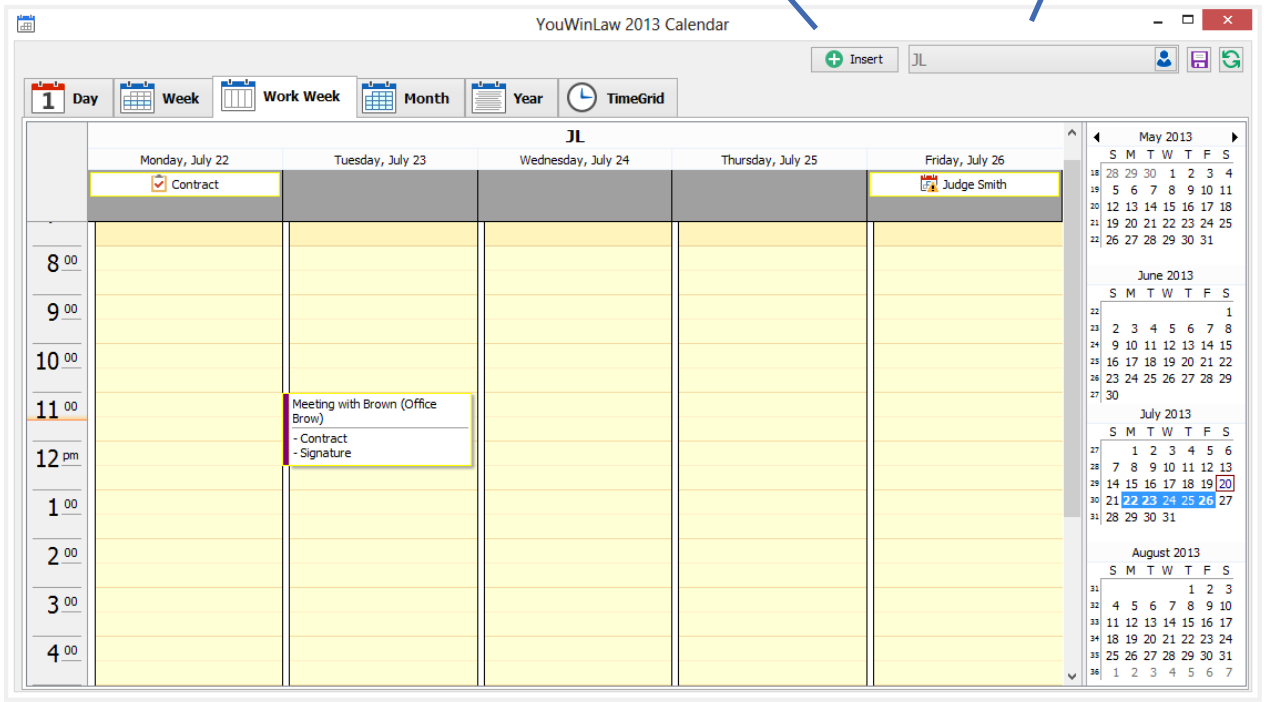


Entries for

- **Tasks / To Do's**
- **Deadlines**

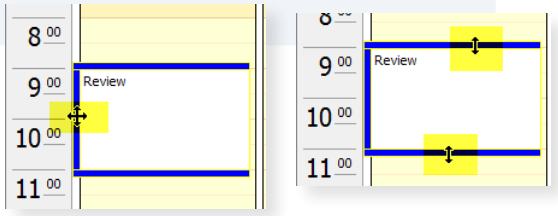
are always shown at the top of the day.

- **Appointments**



Calendar:
Navigation Pane

TIP: You can move entries with the mouse, change the start time or end time, or move the entry to another user/ owner



Tooltip with the main information to the entry

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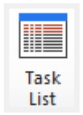
Task List

Displays all appointments, tasks and deadlines in chronological order.



Date	Type	Us...	Project Name	Description
2/10/2013	Deadline	JL	Acme Corporation	Draft Contract
2/11/2013	Task	JL	Acme Corporation	Tel Mr Brown
2/18/2013 09:00	Appointment	JL	Acme Corporation	Directors meeting
7/22/2013	Task	JL	Acme Corporation	Contract
7/23/2013 11:00	Appointment	JL	Acme Corporation	Meeting with Brown
7/26/2013	Deadline	JL	Acme Corporation	Judge Smith

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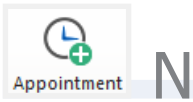
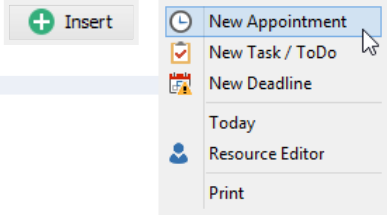
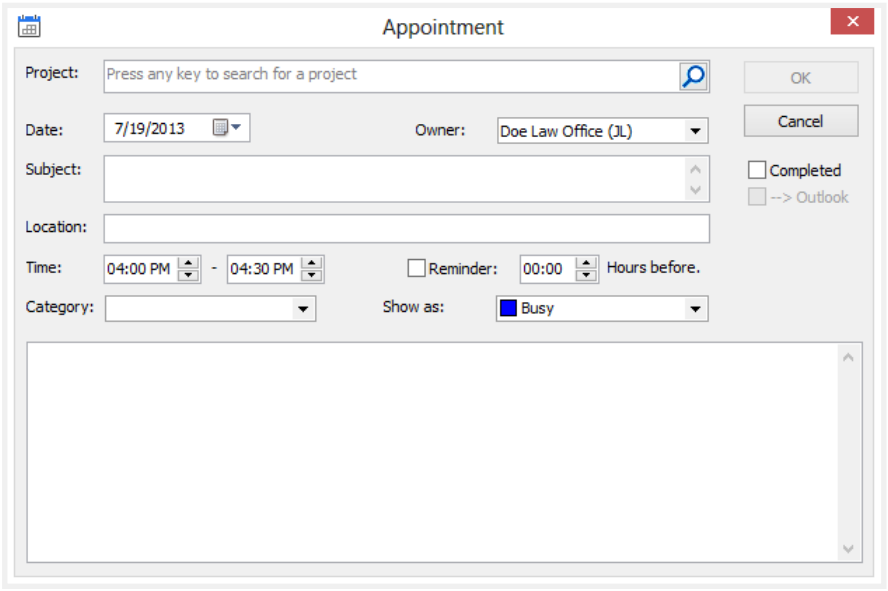
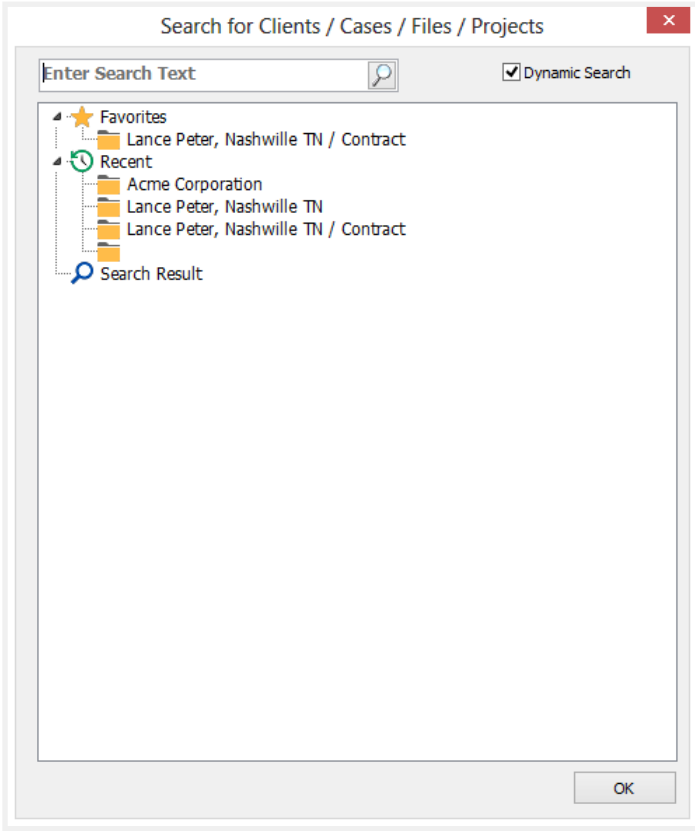


New Appointment







Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

User: The login user is proposed automatically.

Subject: Subject

Location: Location

Time: Time of the appointment.

Completed: Activate the check box, when the appointment is done the display color in the Work Screen / File changes automatically.

Reminder: Activate the check box, if you want to be reminded of the appointment.

Hours Enter here how long before the appointment you want to (before app.): be reminded.

Note: Enter here as much text as you like.

Category: Category

Show as: Show as in Calendar: (Free, Tentative, Busy, Out of Office)

Outlook If checked then appointment is automatically entered in Outlook.

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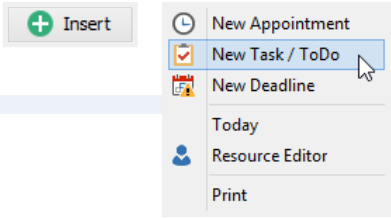
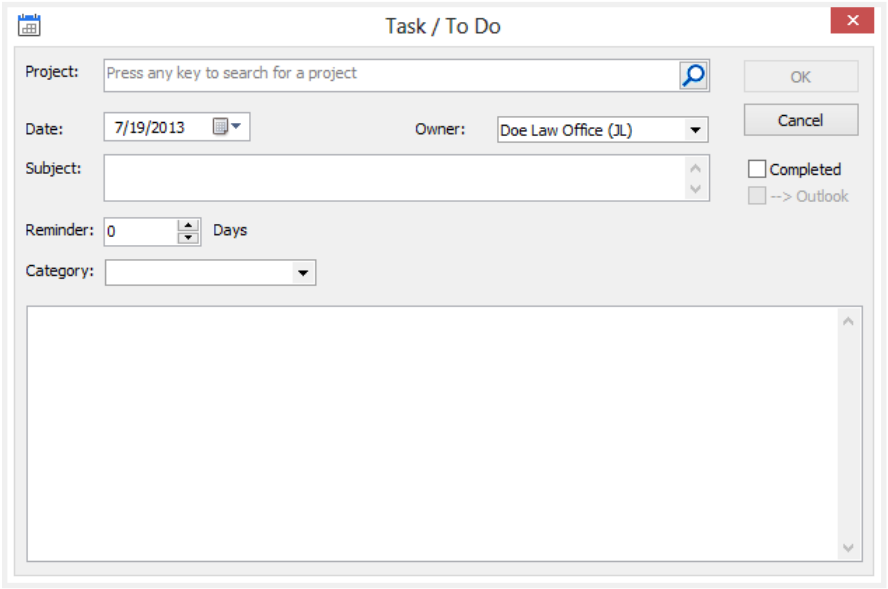
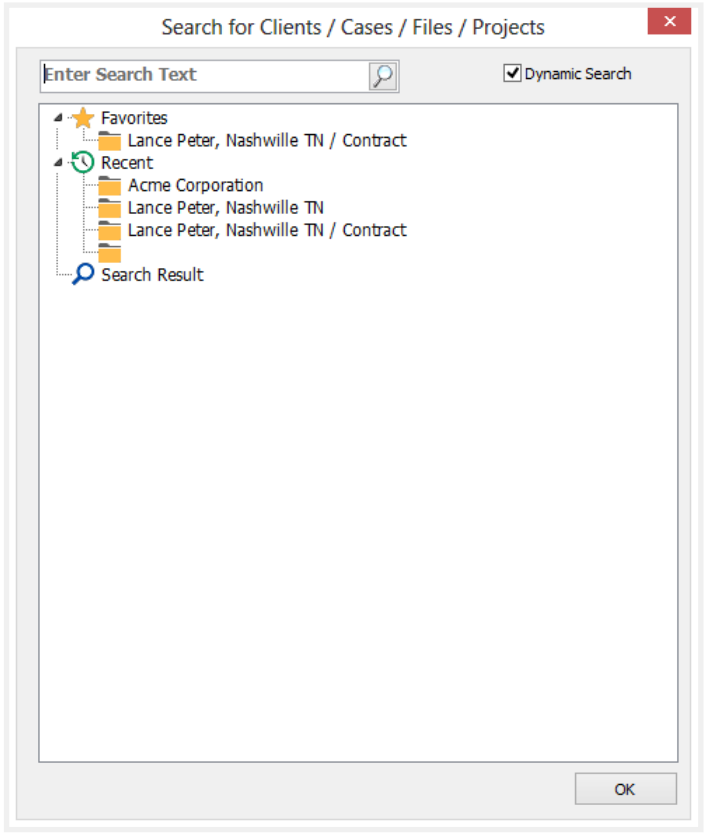


Task

New Task / ToDo





Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

User: The login user is proposed automatically.

Reminder: Enter the number of days. During this period the Work Screen / File entry is displayed in a warning color.

Done: Activate check box, when the task is finished – color display in the Work Screen / File changes automatically.

Note: Enter here as much text as you like. This text will be displayed in the Work Screen / File.

Outlook If checked then task is automatically entered in Outlook.

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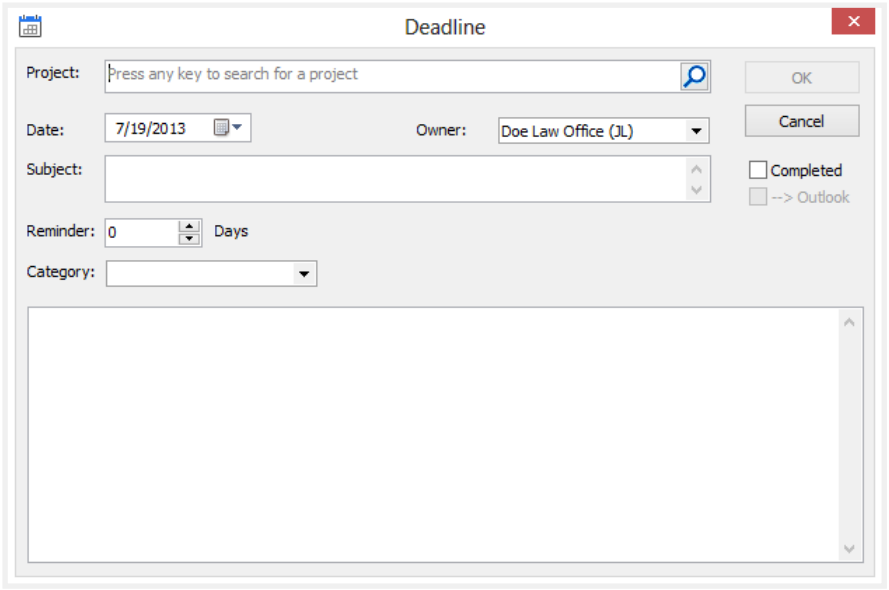
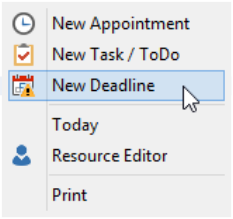
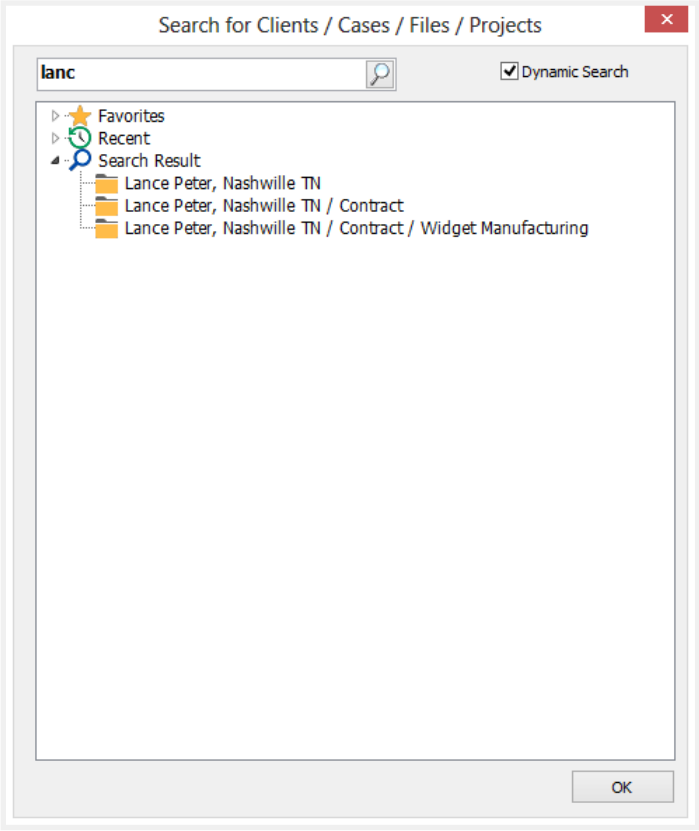
New Deadline







Date: Select the desired Date (click on the small date icon or type it directly, standard display is today's date).

User: The login user is proposed automatically.

Reminder: Enter the number of days. During this period the Work Screen / File entry is displayed in a warning color.

Done: Activate check box, when the deadline is finished – color display in the Work Screen / File changes automatically.

Note: Enter here as much text as you like. This text will be displayed in the Work Screen / File.

Outlook If checked then deadline is automatically entered in Outlook.

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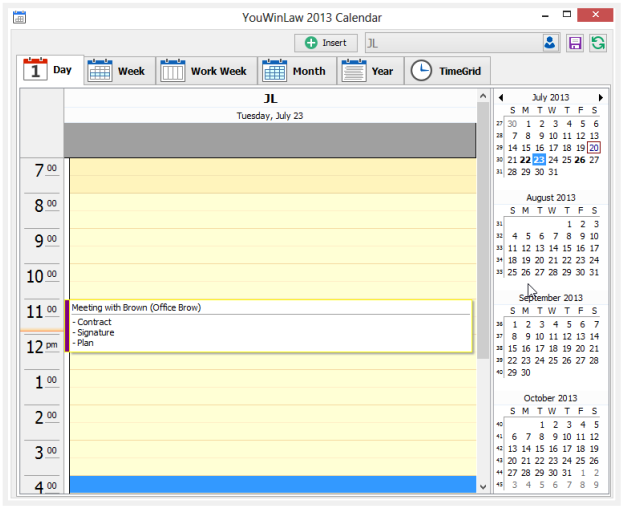
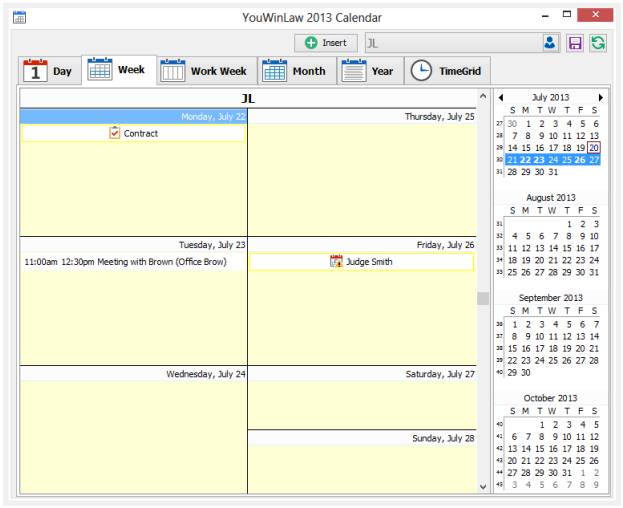
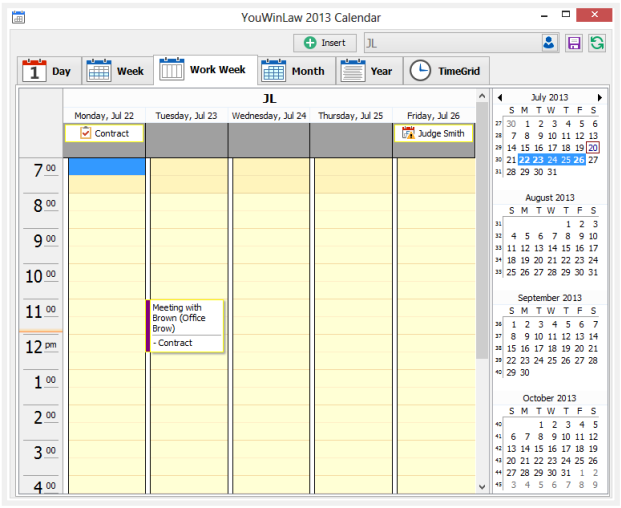
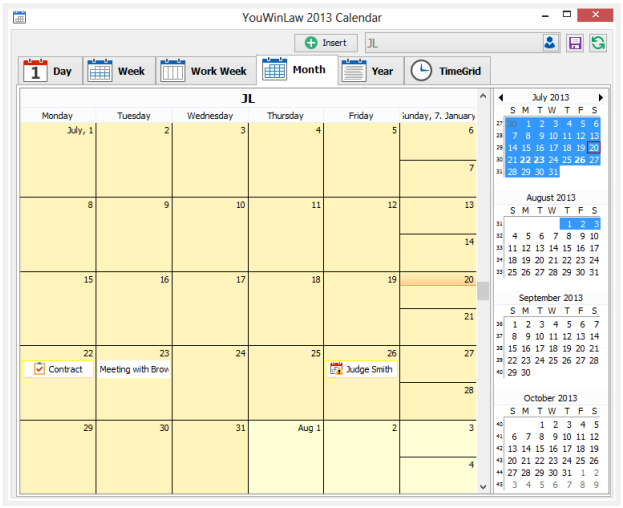
Calendar Views

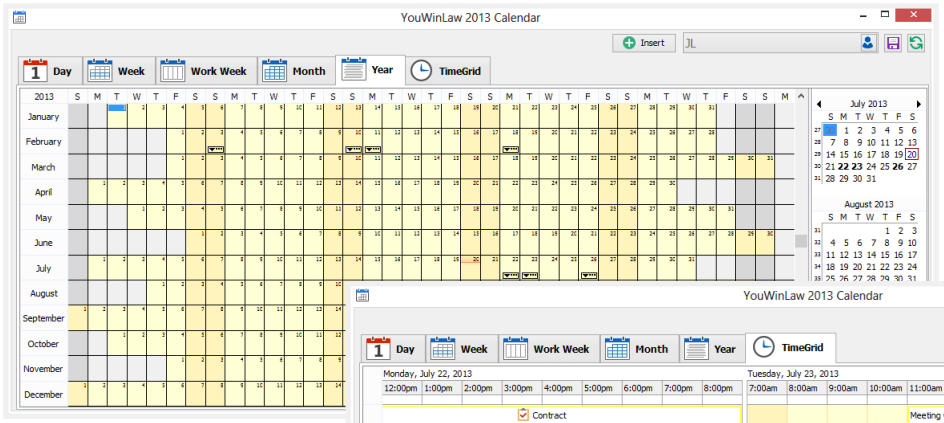
Different Calendar views

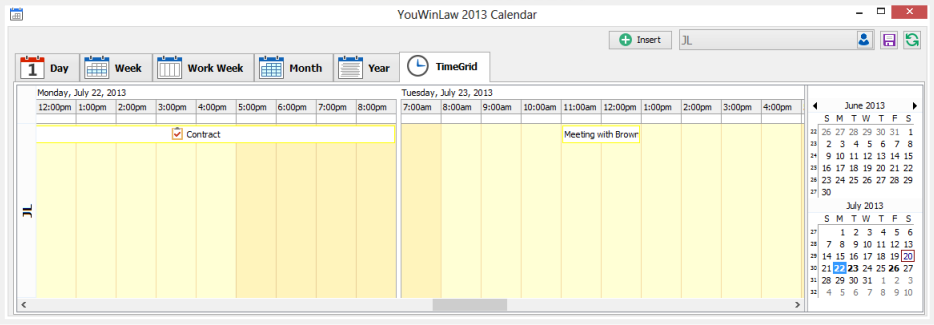












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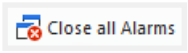
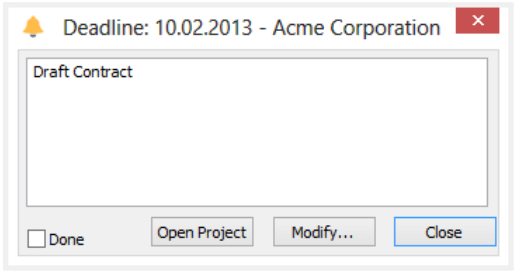
View

Close all Alarms Closes all Alarm Windows.





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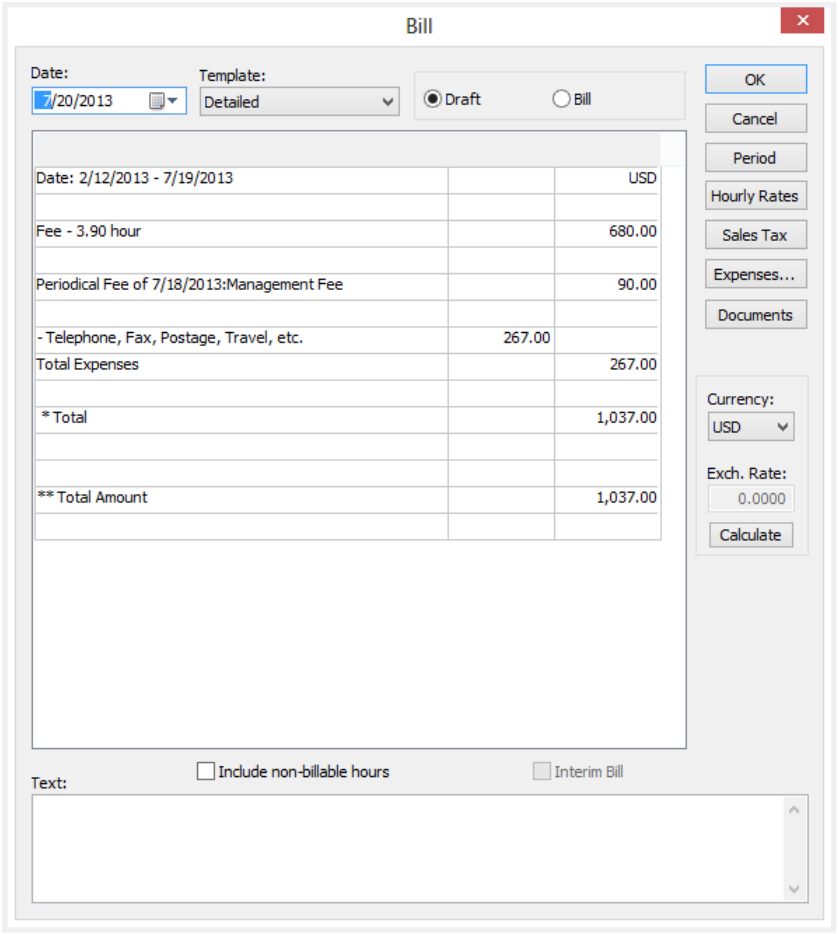
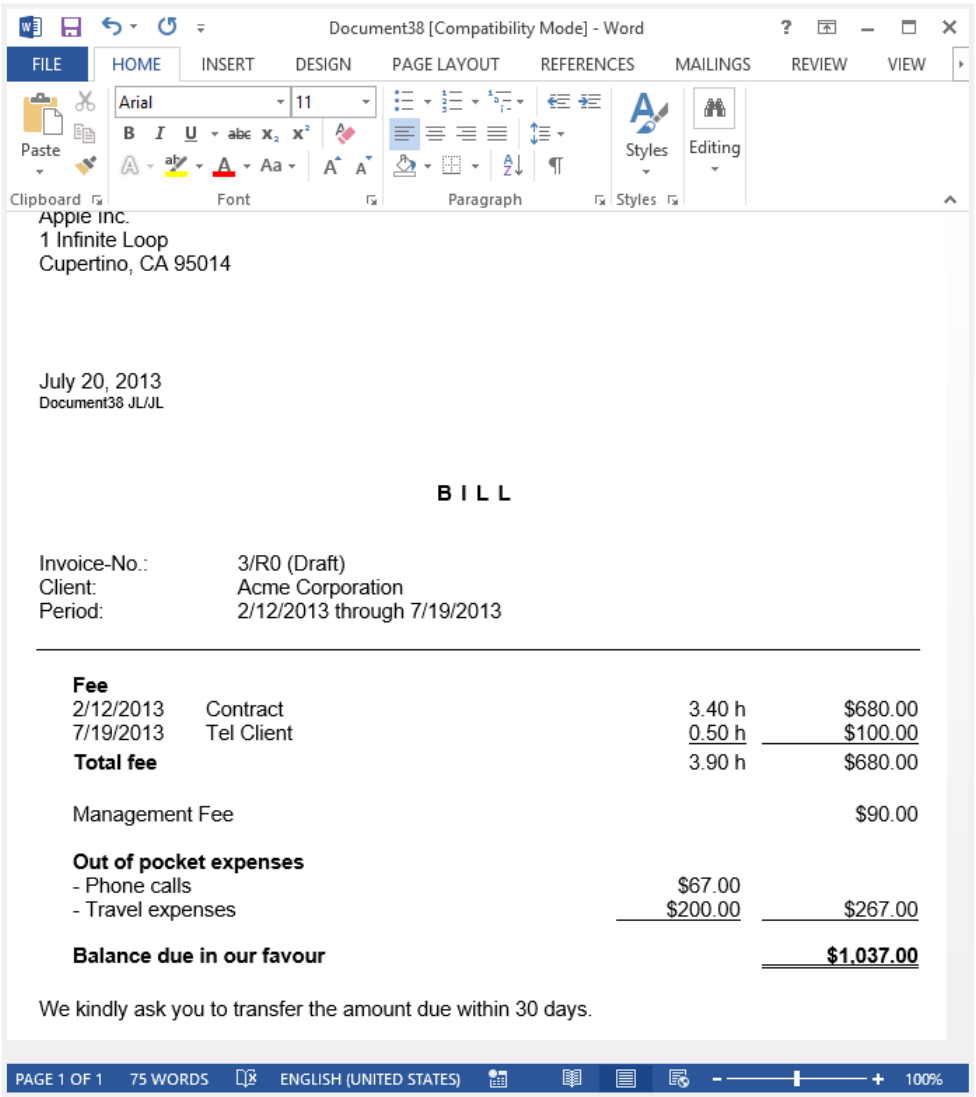
Billing

Under this tab, bills are automatically created according to your specifications.





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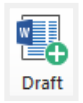
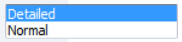
Billing

Draft

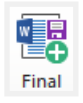


Template: This is the default template for the selected project. You may select a different template.

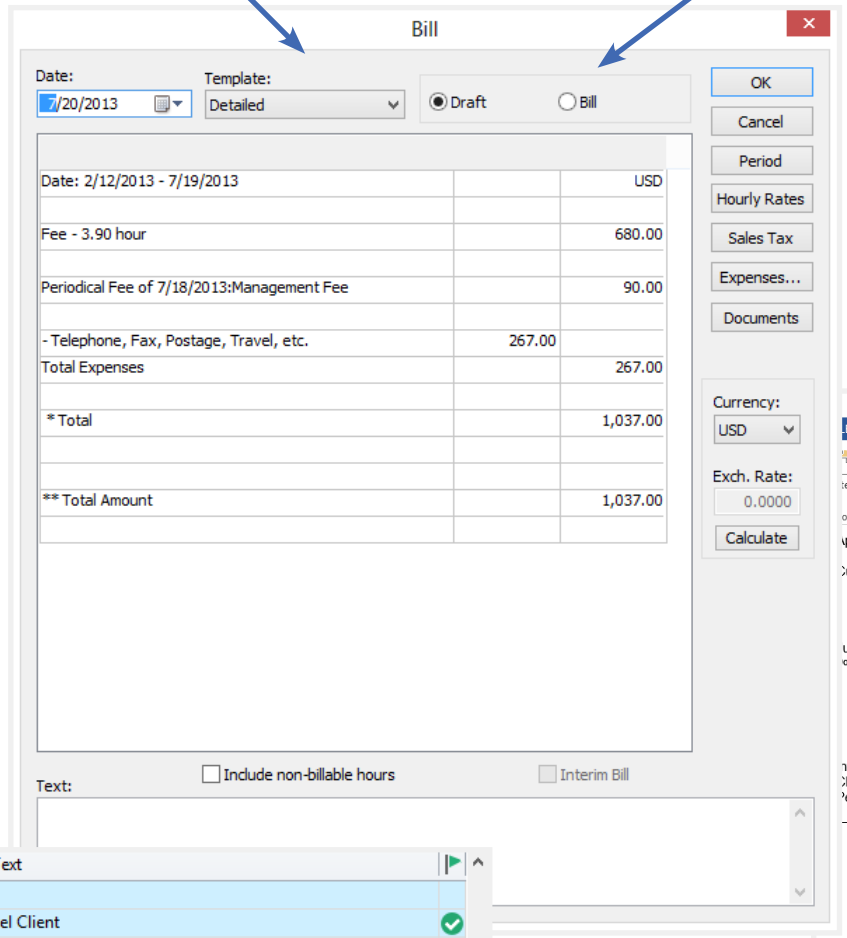


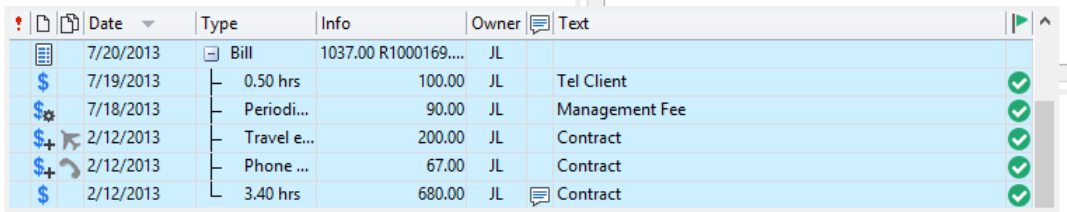
- **Final**: The bill is saved, all related records (fees, expenses, payments) are assigned to this bill and marked as billed.
- **Draft**: Bill is generated but not saved. The draft bill creates a document in Word without saving it. All entries remain "unbilled".

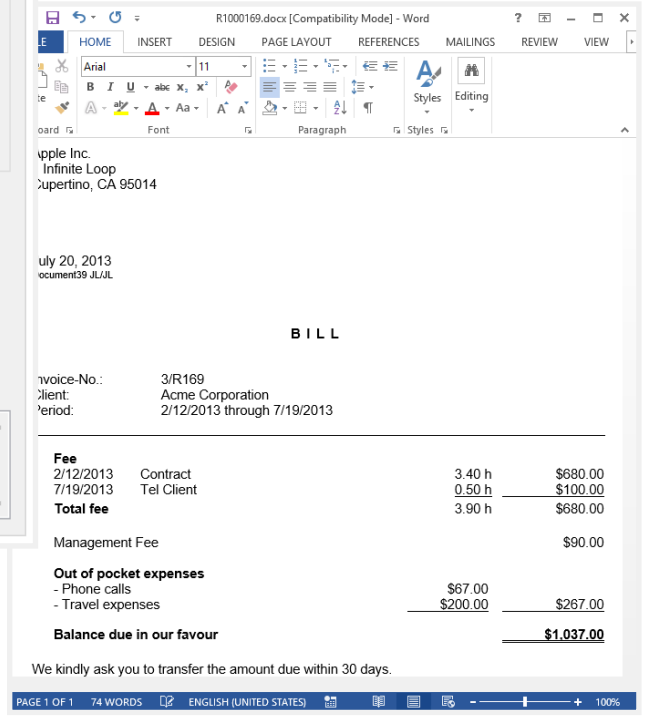
Final



Overview of all open fees, expenses and advance payments. If you double click on an item, then this item is disabled in this bill.

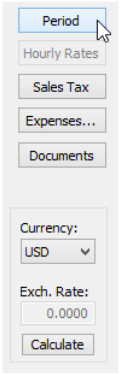





R1000169.docx [Compatibility Mode] - Word
BILL
Invoice-No.: 3/R169
Client: Acme Corporation
Period: 2/12/2013 through 7/19/2013
Fee
2/12/2013 Contract 3.40 h $680.00
7/19/2013 Tel Client 0.50 h $100.00
Total fee 3.90 h $680.00
Management Fee $90.00
Out of pocket expenses
- Phone calls $67.00
- Travel expenses $200.00 $267.00
Balance due in our favour $1,037.00
We kindly ask you to transfer the amount due within 30 days.

Copyright ©WinYou Law Inc.

Period



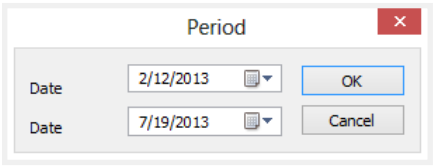
Automatically all open fees and expenses are shown. Before you define the time period for the work you want to invoice, decide whether you want the Non-billable Hours (entries with rate 0 and amount 0) to be included or not, by activating/deactivating the check box.

Date from: Enter the desired date for the first billable entry.

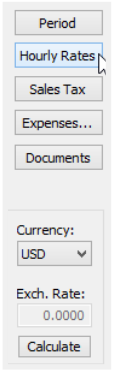
Date to: Enter the desired date for the last billable entry.

Close with the OK button.

YouWinLaw displays immediately the selected time period and the corresponding entries.



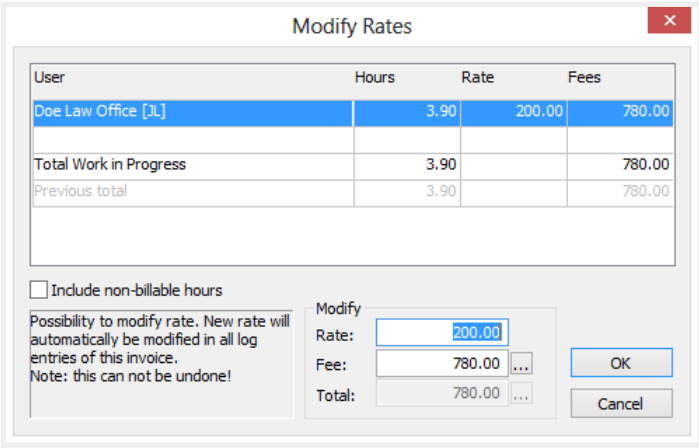
Hourly Rates



In this dialog you can change the fee rate and the fee total for the selected time period. The number of hours cannot be modified. If you want to include the Non-billable Hours, you have to activate the check box.

1. Press on the button Hourly Rates and the window Modify Rates is displayed.
2. Select the user, whose rate or fee you want to change and perform the changes in the field Rate or Fee at the window bottom.
3. If you want to modify the total amount, select the line *Total and enter the new amount at the window bottom. The rates and fees of the users are adapted automatically and the previous Total remains listed as a piece of information.

Close with the OK-button.



Hourly Rate in a foreign currency (Option)

You can modify the rates and fees per user in the project currency. Proceed as follows:

1. Press the button next to the fields Fee or Total and the Dialog Currency Adjustments is displayed.
2. Modify the amount in the project currency by overwriting it.
3. Press the OK-button and the modified amount is listed in the system currency in the window Modify Rates.

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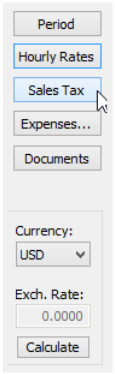
Sales Tax / VAT

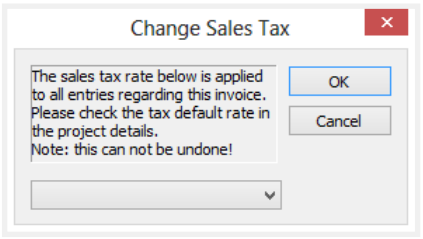


Press the button "TAX" and the dialog Change Tax is displayed.

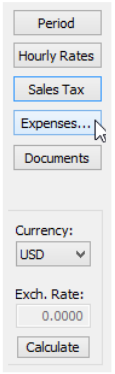
Press the arrow-button and select the new VAT-rate. Attention: you cannot undo this modification.

Close with the OK-button.

All the Tax-rates are changed except the fixed Tax-rates of expenses.

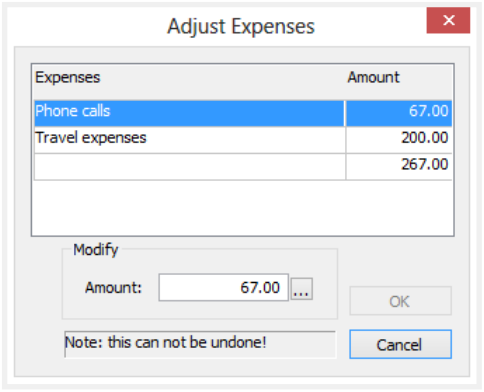

Change Sales Tax
The sales tax rate below is applied to all entries regarding this invoice. Please check the tax default rate in the project details.
Note: this can not be undone!
OK
Cancel

Expenses

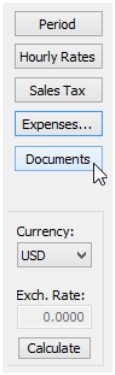


In this dialog you can modify the total amount per type of expense. The overall total cannot be modified, you have to change the different type of expenses.

1. Press the button EXPENSES
2. Select the type of expenses you want to modify and type the new amount in the field Amount.
3. Close with the OK-button.

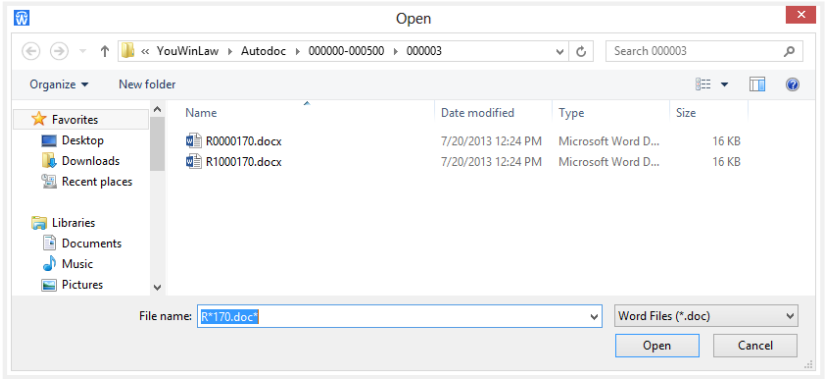


Documents



Shows all generated bills with the actual bill number and you can open the bill document directly.

If the bill document exists with several templates, e.g. Normal = R0000374.doc and Detailed = R1000374.doc, YouWinLaw displays a selection dialog.



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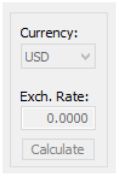
Currency



Bill with foreign Currency (Option)

If a foreign currency has been selected as project currency, it is automatically displayed, when you create an invoice. The amounts are listed according to the standard exchange rate of the corresponding currency.

To change currency or exchange rate, you have to adapt the following fields:

Currency:	Standard display is the project currency. Select the desired currency.
Exch. Rate	You can overwrite the displayed exchange rate in this field.
Calculate:	If you press this button, the system calculates the new amounts and displays them automatically.

The advance payments are not concerned by exchange rate modifications at the creation of a bill.

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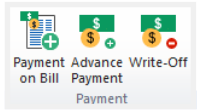
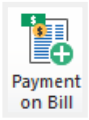
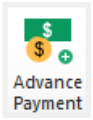


Payment

Payment on Bill

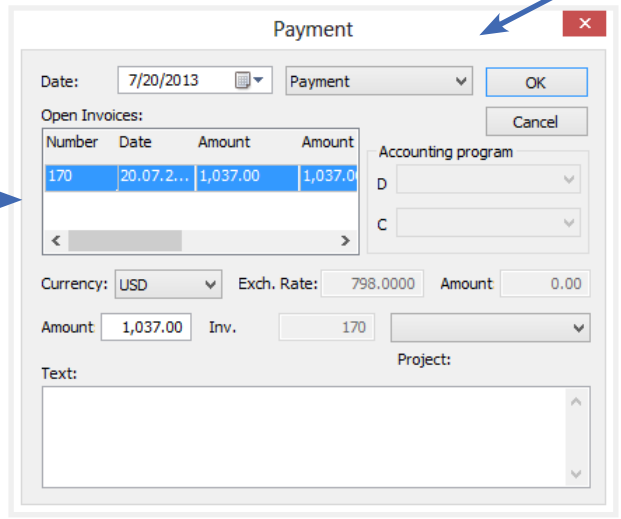


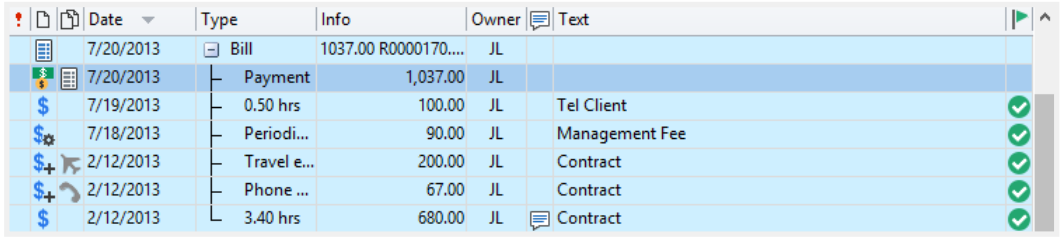
Advance Payment



Write-Off

Overview over all open bills





- **Payment**: If you select Payment or Write Off, the window Open Invoices will be enabled. With a double click on the selected Bill, all data like Amount and Bill No. will be automatically filled in. If part payments have already been done, YouWinLaw will automatically fill in the difference.

- **Advance Payment**
  If you select Advance Payment / Payment on Account, you just fill in the Amount. This will be automatically recognized in the next Bill.

- **Write-Off**

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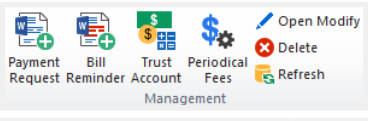
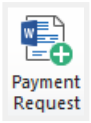
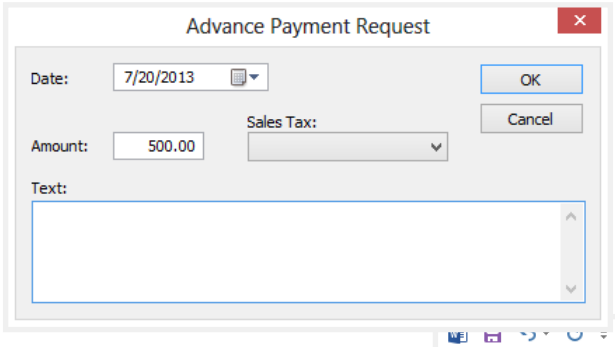


Management

Payment Request

Create an advance request in a Word Document





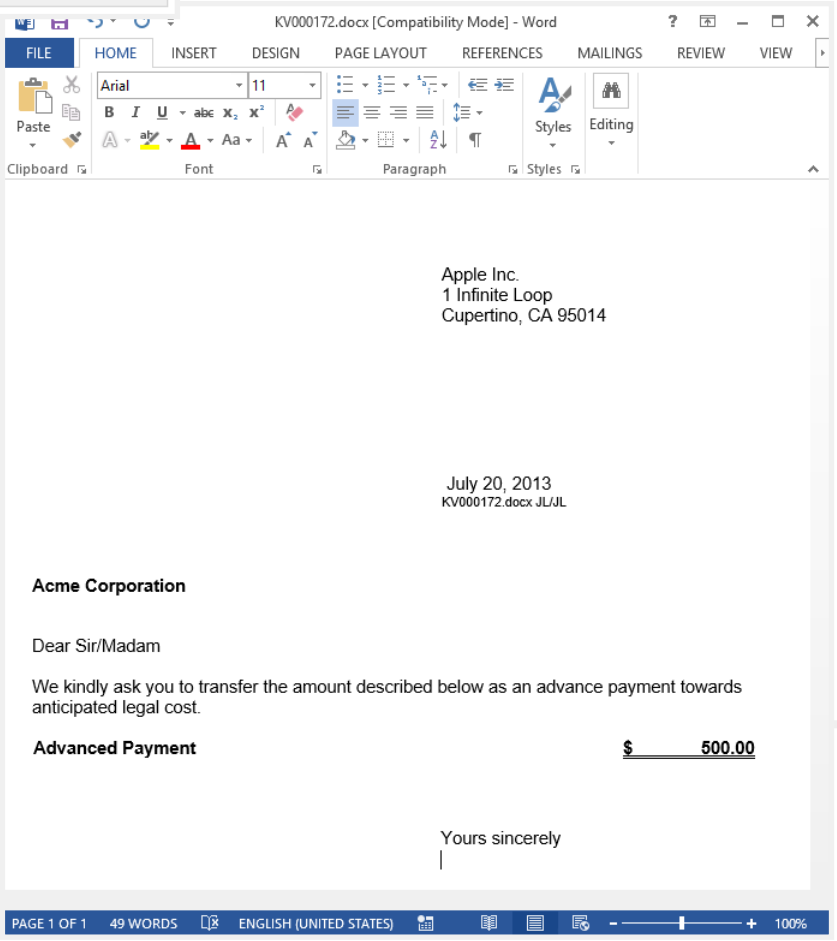
Date: Select the desired Date. Standard display is today's date.

Amount: Insert the amount. If some work has already been recorded, a proposal is displayed. You can overwrite it.

Tax: Select the Tax-rate by clicking on the corresponding field.

Text: Enter in this field any text you want. You can use shortcuts.

The document is now created in Word and can be edited. It is saved automatically and registered in the project.



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Bill Reminder

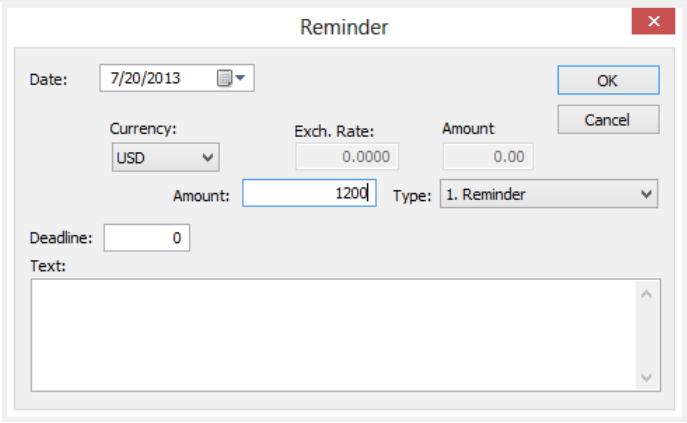
Date: Select the desired Date. Standard display is today's date.

Amount: Enter the amount.

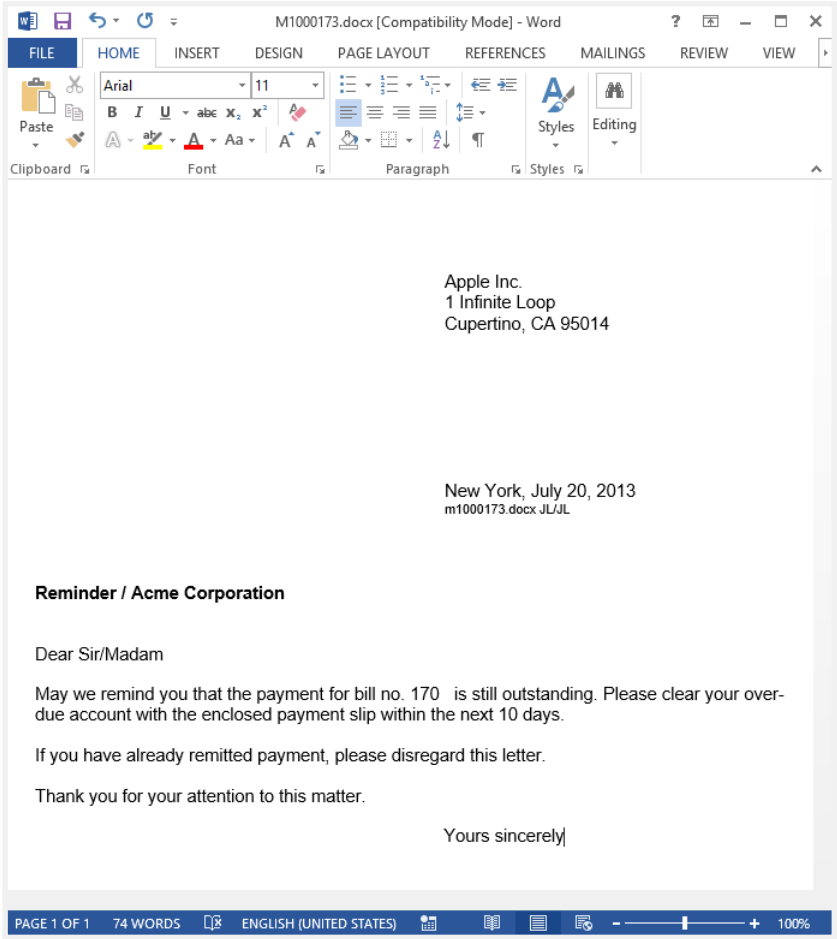
Type: Select the type of reminder by clicking on the field and on the corresponding line (selection possible, if several types have been installed.)

Deadline: Insert the Deadline in the corresponding field.

Text: In the text field you can enter any text you want. You can use shortcuts.



The document is now created in Word and can be edited. It is automatically saved and registered in the project.



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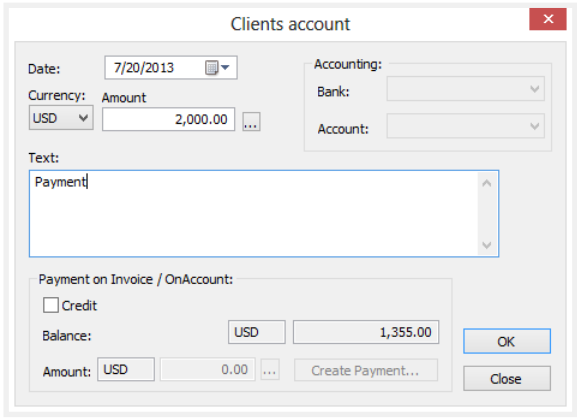
Trust Account

Third Party Funds / Clients' Account Entry (optional)

Trust Account

Enter the amount in the amount field. Payment: If you want to enter a payment, you enter the amount with a minus-sign in front, e.g. –10'000.00.

In the summary window you will always see the actual status.



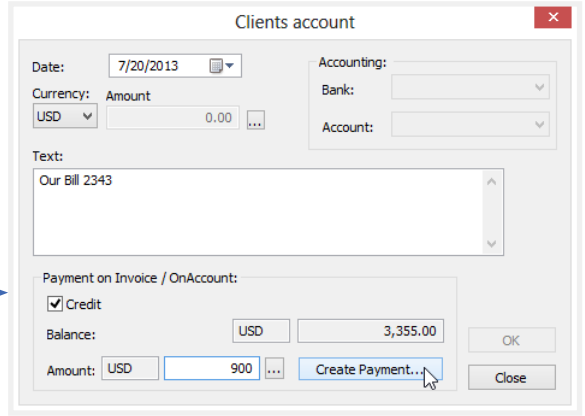
Payment on Invoice / Clients' Account for advance payments

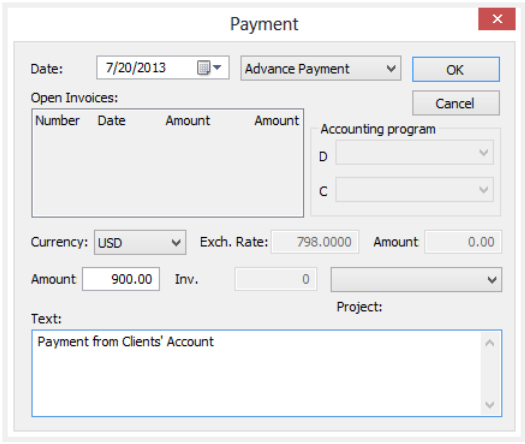
Activate the check box "Credit". Enter the amount.

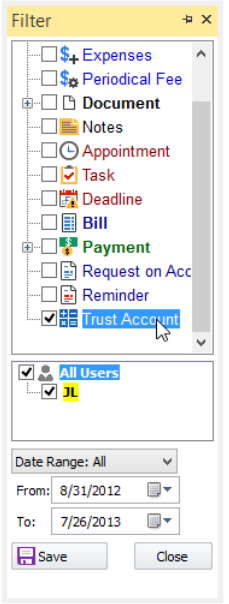
Click on the button "Create Payment". The payment / advance payment is created automatically.

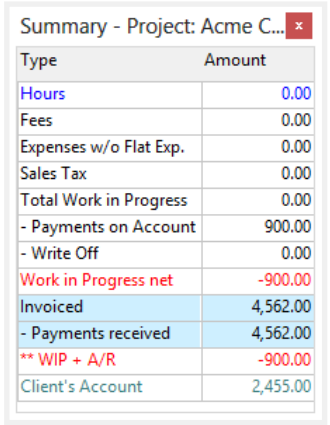
Paying own Bills

Current balance



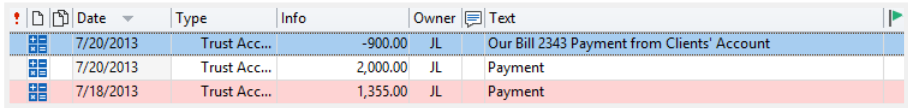






Summary - Project: Acme C...

Type	Amount
Hours	0.00
Fees	0.00
Expenses w/o Flat Exp.	0.00
Sales Tax	0.00
Total Work in Progress	0.00
- Payments on Account	900.00
- Write Off	0.00
Work in Progress net	-900.00
Invoiced	4,562.00
- Payments received	4,562.00
** WIP + A/R	-900.00
Client's Account	2,455.00



Date	Type	Info	Owner	Text
7/20/2013	Trust Acc...	-900.00	JL	Our Bill 2343 Payment from Clients' Account
7/20/2013	Trust Acc...	2,000.00	JL	Payment
7/18/2013	Trust Acc...	1,355.00	JL	Payment

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Periodical Fees

An overview over all periodical fees for this project will be shown. Press "New" to enter a new periodical fee.

From: Type the starting date.

To: Type the ending date.

Period: Select the desired periodicity.

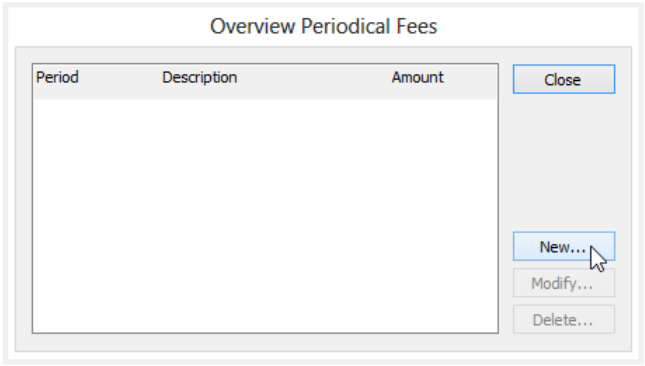
Amount: Type the amount you want to be invoiced.

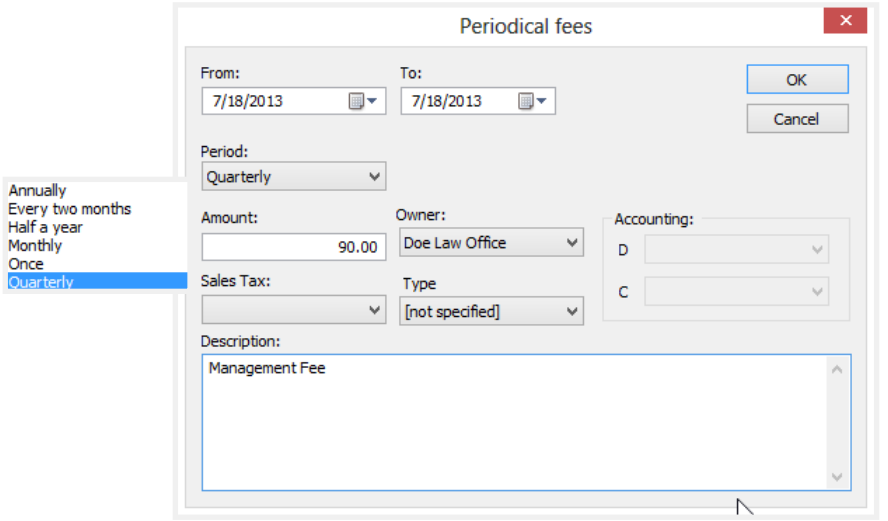
Tax: Select the desired Sales Tax or VAT-rate with the arrow-key.

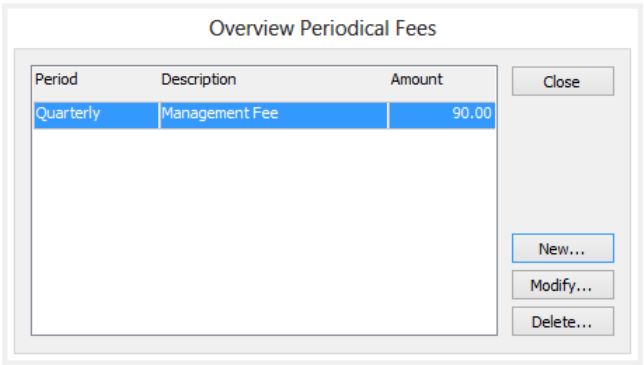
Owner: Select the desired user with the arrow-key.

Type: Select the desired type of periodical fee with the arrow-key.

Description: Enter the text to be displayed.







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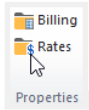
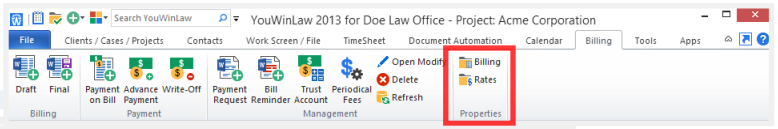
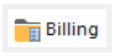


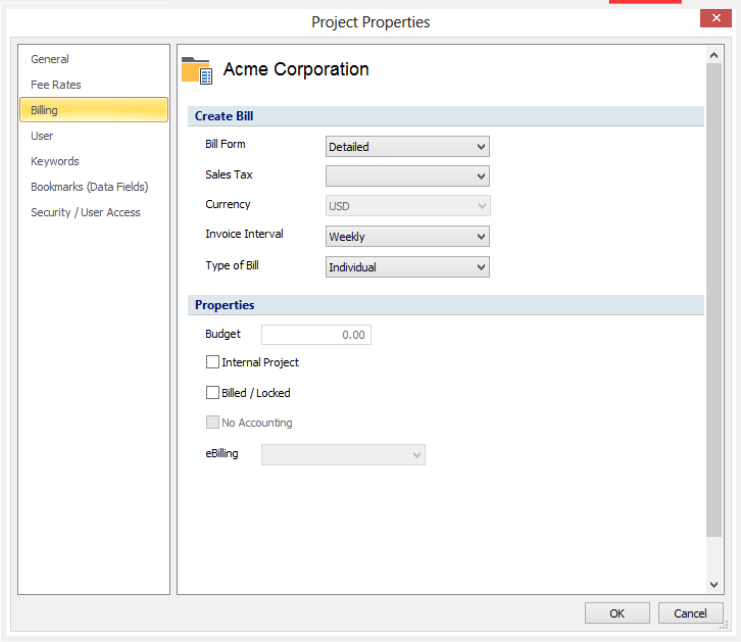
Properties



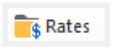
Billing



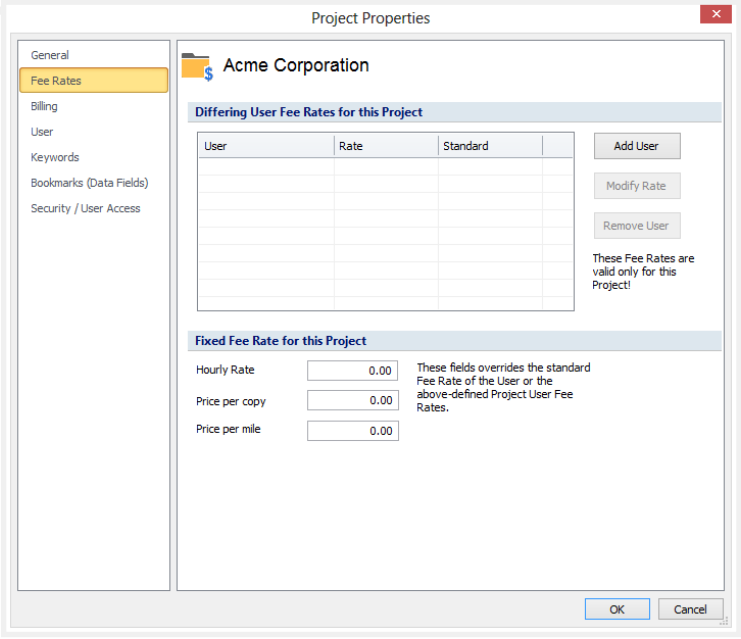
With the different billing properties you have the possibility for different settings.



Rates



Change the default rates for the users within selected project.



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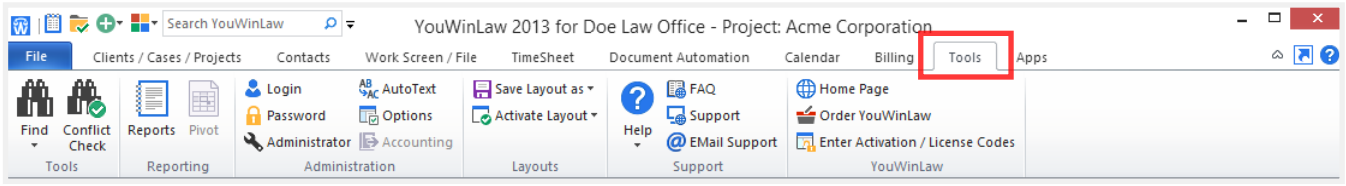
Tools

Introduction

Here are the different functions, they are independent of a project, eg find, reporting or program options.



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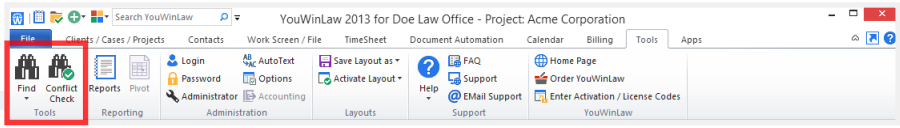
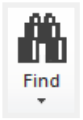
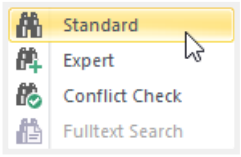


Tools

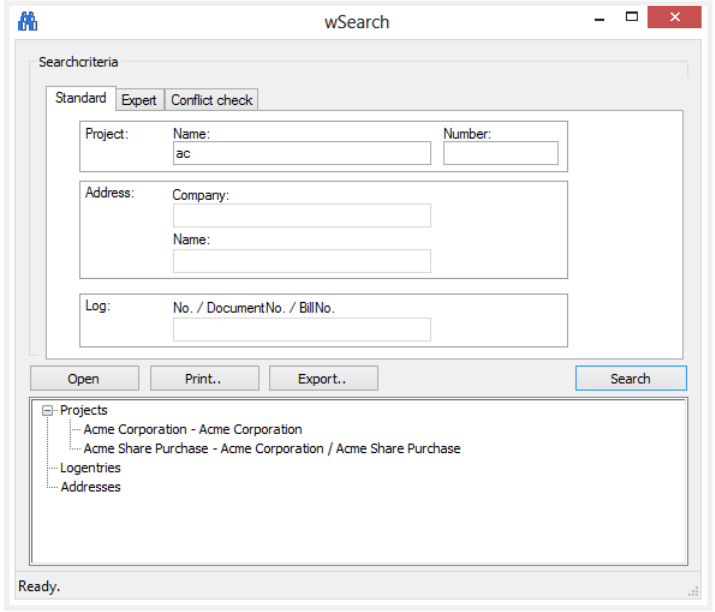
Find Standard





The Search was specially created for comfortable and quick search procedures. In standard mode, you can search according to predefined criteria, in Expert, Conflict Check and Full Text Search (Option) you can search with individual criteria. Those criteria can differ from our description, depending on the settings in your database.

You can work with YouWinLaw and Search at the same time.



- In the Project fields you can enter the following criteria:

  Project Number Enter the project number.

  Project Name Enter the project name or parts of it (e.g. int.)

- In the Address field you can enter the following criteria:

  Company The search is performed in: company name or first name. Enter the company name, or, in case of a personal address, the first name.

  Name The search is performed in: second line of the company name or last name.
  Enter the second line of the company name or the last name of a person.

- In the Activity Log field you can enter the following criteria:

  Invoice Enter the invoice number (e.g. 2381 for I0002381)

  Document Enter the document number (e.g. 5691 for L0005691)

  Activity Log entry Enter the Activity Log number (e.g. 356)

You can use wildcards. The character "%" or "*" allows you to search for text parts. Thus the statement, "%a" found in the Project Name field, all projects that contain `a` in the name

After having entered the desired data you click the button "Search" or use the "enter" key. Select and double click the desired entry or click on the button "Open". The Project is automatically opened in YouWinLaw and selected.

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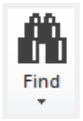
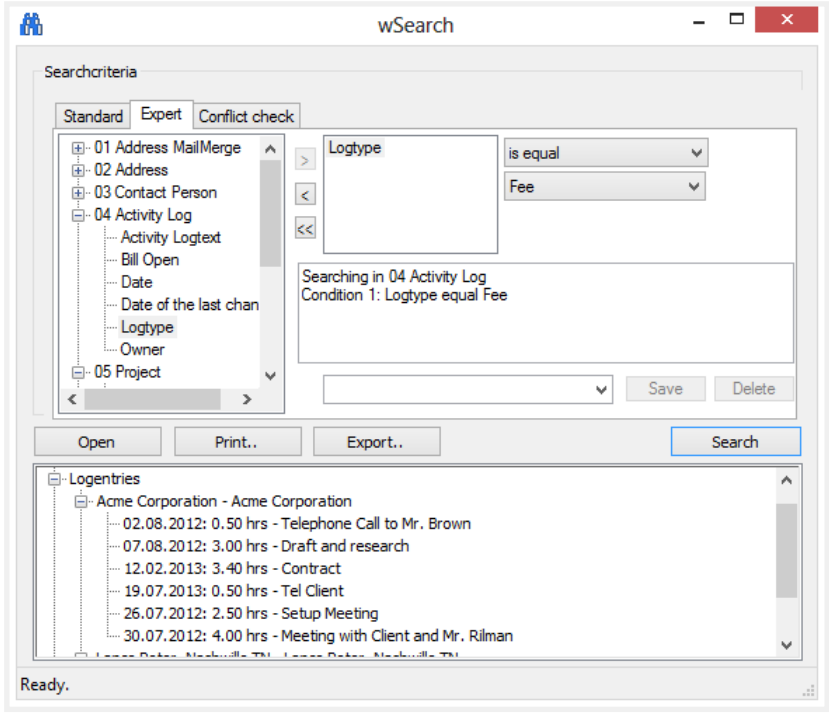
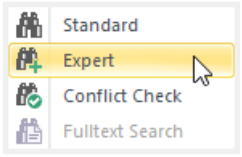
Find Expert



1. Select and double click a search criteria (you can use the arrow-key.) Your selection is displayed immediately.
2. Select the conditions. The conditions vary according to the criteria. They can signify e.g. a selection (address codes, language, search words etc.), a date or a time period (between... and ...), a text etc.
3. To start the search you press the button Search.
4. Select and double click the desired entry or click the button "Open".
5. The desired item is automatically highlighted in YouWinLaw and can be opened by a double click.





Info: If you want to deactivate a search criterion or delete it, select it in the window and click on the arrow-button. If you want to deactivate all the search criteria, click the double-arrow-button.

E.g., if you are looking for a telephone number, you can enter it with a percent-sign in front and behind: %211 05% (in the Access-version, instead of the %-sign, you type a star *.)

Combine search criteria

You can combine certain search criteria, e.g. in the Activity Log section: date of a Activity Log entry and Activity Log text.

Save Expert Search

You can save your single search configurations. Proceed as follows:

1. Select and double click a search criterion (you can assign it with the arrow-key.) Your selection is displayed.
2. Select the conditions.
3. In the field at the left of the button "Save" you enter the title of the search.
4. Click on the button "Save".

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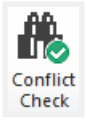
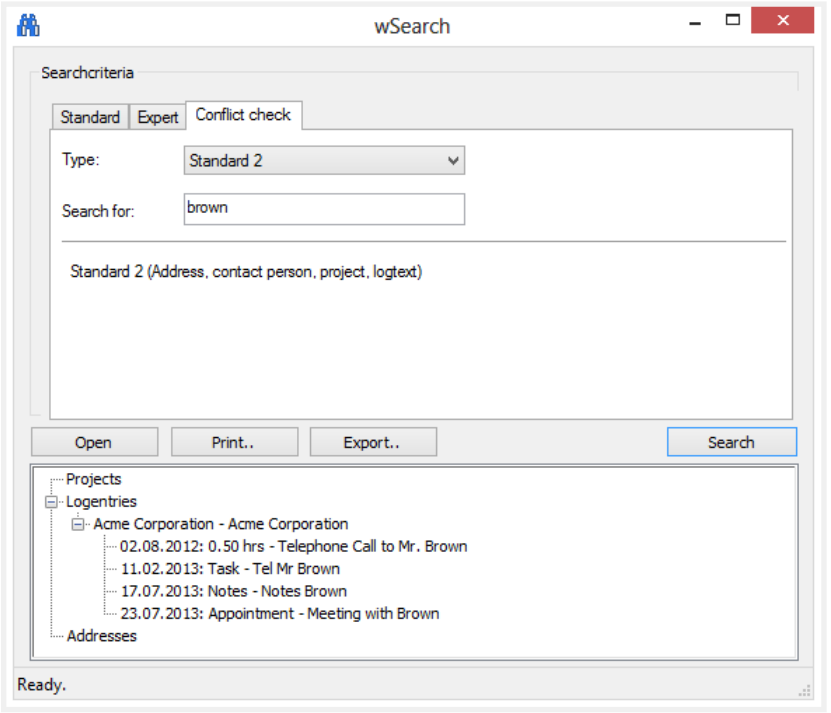
Search

Conflict Check



1. Select the type of search in the field "Type".
2. In the field "Search" enter the search criteria.
3. Click on the button "Search" to start the conflict check.
4. Select and double click the desired entry or click the button "Open".
5. The desired item is automatically selected in YouWinLaw and you can open it with a double click.

You can combine the search criteria for a conflict check individually, e.g. following the proposals of the Administrator.



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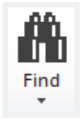
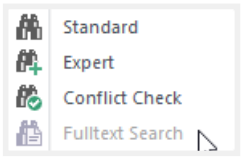
Fulltext Search



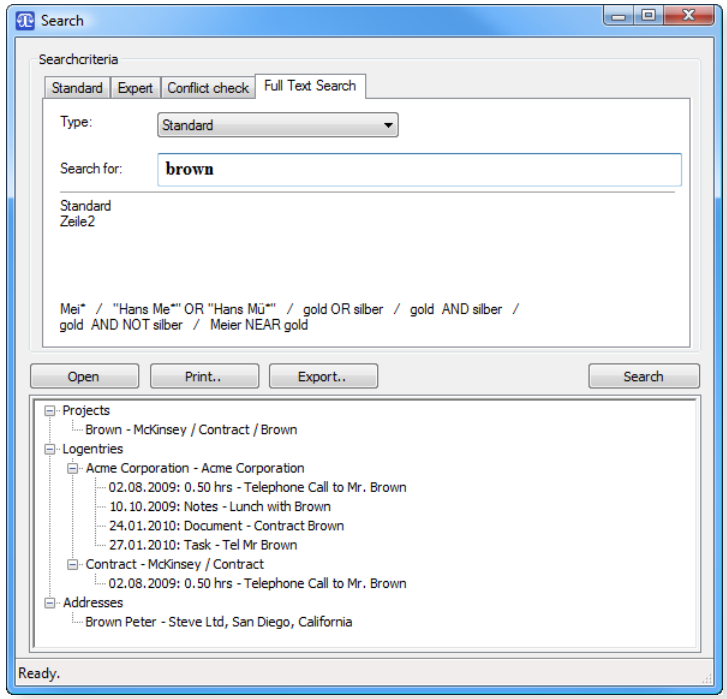


Full-Text Search (Optional)

1. Select the search type in the field "type".
2. Enter the search definitions in the field "Search for". You can find examples for these entries in the Full-Text Search mask.
3. Click the button "Search" to start the search.
4. Select and double click the desired item or click the button "Open".
5. The desired item is automatically selected in YouWinLaw and you can open it with a double click.

Print the search result

You can print the search results in a list-template by clicking the button "Print" after the search is performed.



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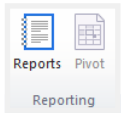
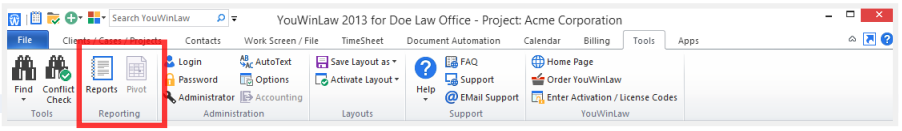
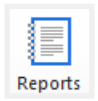
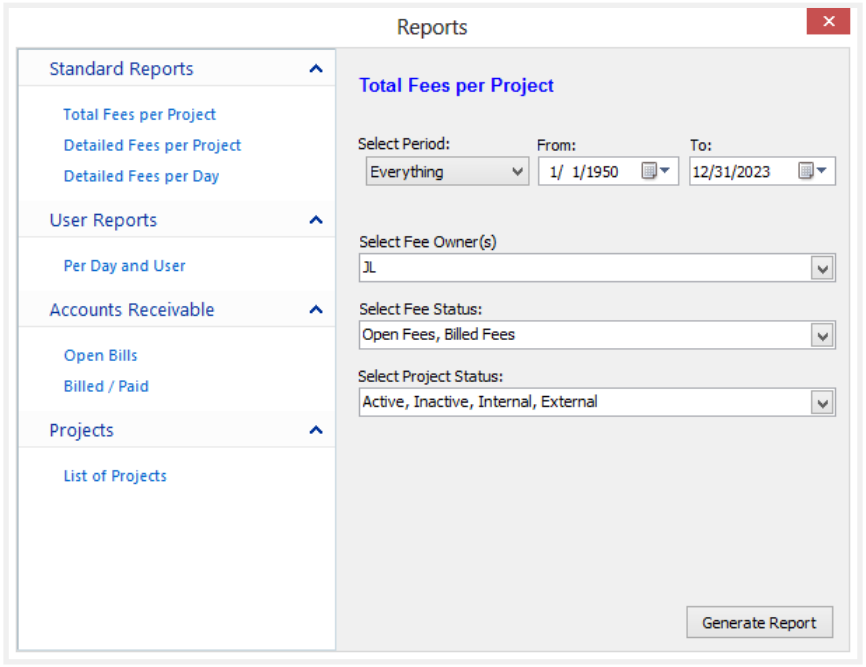


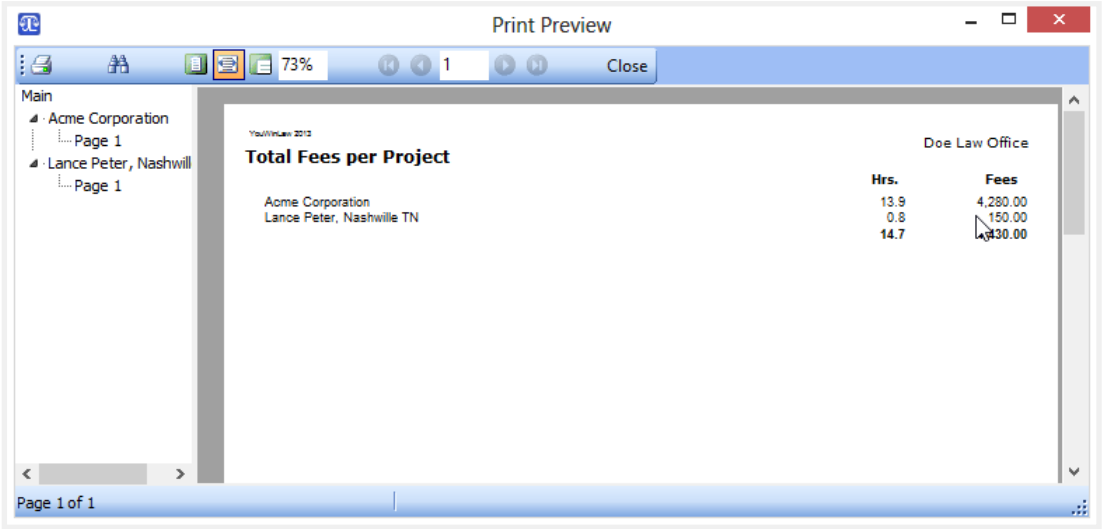
Reporting



Reports







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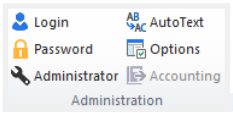
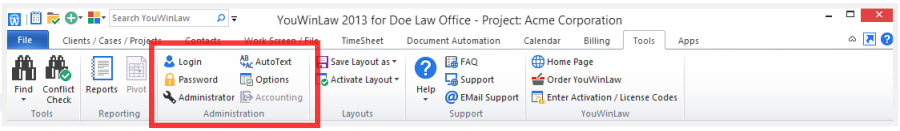
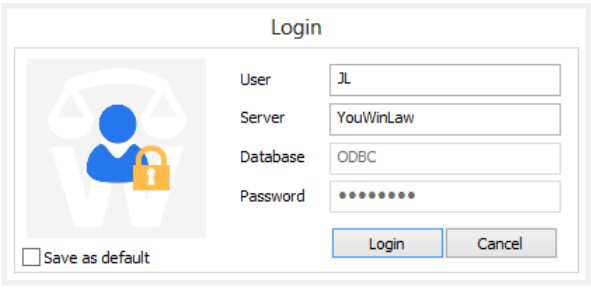


Administration



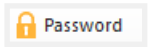
Login

Allows the user to login to another Database.



Password

When this feature is activated, the user has the possibility to change his password himself.



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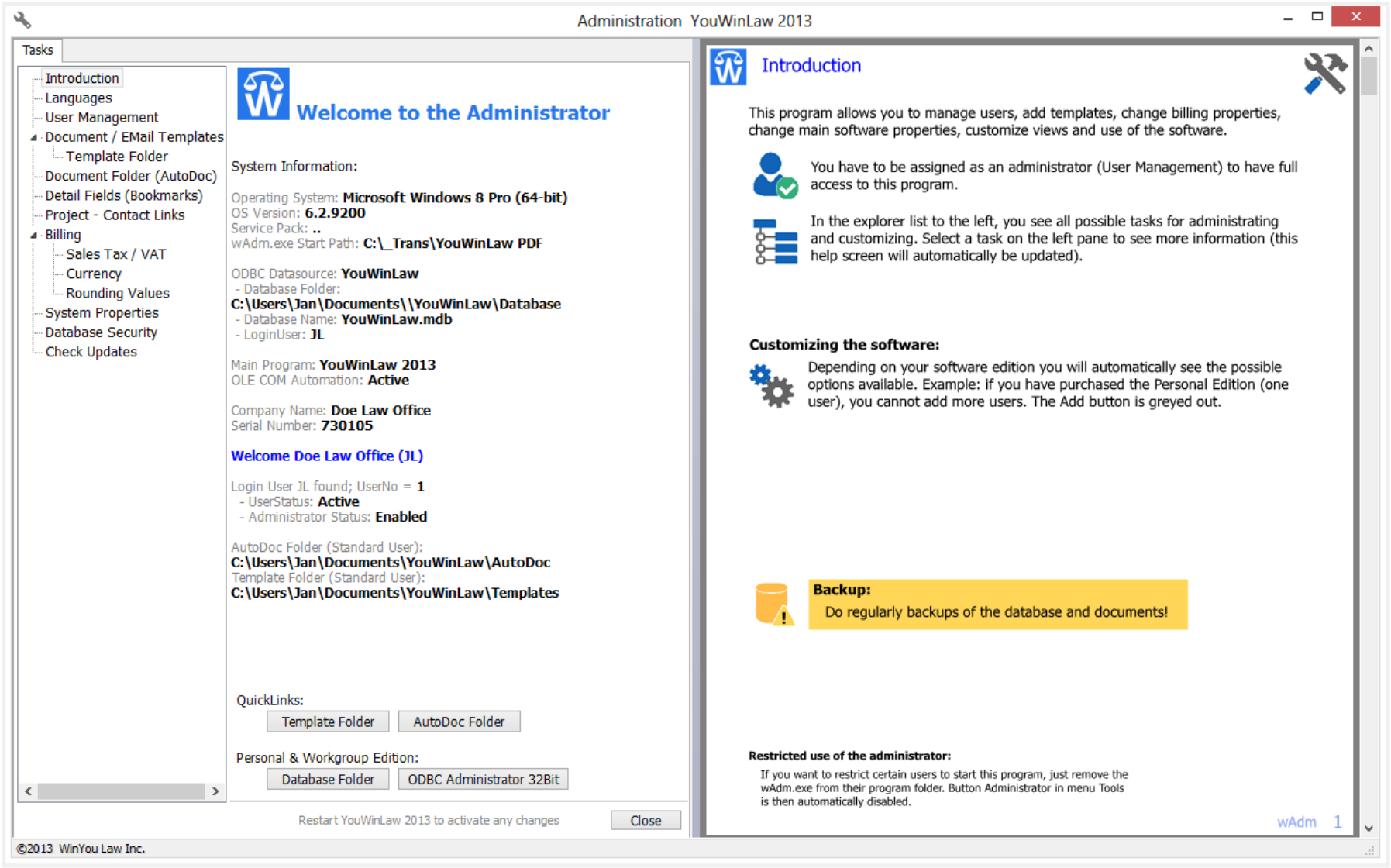
Administrator

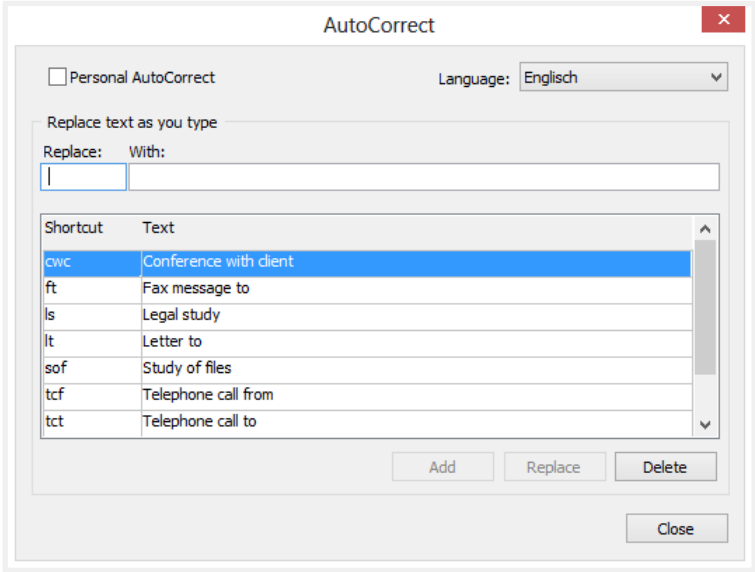
Administrator


Administration YouWinLaw 2013
Tasks
Introduction
Languages
User Management
Document / EMail Templates
Template Folder
Document Folder (AutoDoc)
Detail Fields (Bookmarks)
Project - Contact Links
Billing
Sales Tax / VAT
Currency
Rounding Values
System Properties
Database Security
Check Updates
Welcome to the Administrator
System Information:
Operating System: Microsoft Windows 8 Pro (64-bit)
OS Version: 6.2.9200
Service Pack: ..
wAdm.exe Start Path: C:_Trans\YouWinLaw PDF
ODBC Datasource: YouWinLaw
- Database Folder:
C:\Users\Jan\Documents\\YouWinLaw\Database
- Database Name: YouWinLaw.mdb
- LoginUser: JL
Main Program: YouWinLaw 2013
OLE COM Automation: Active
Company Name: Doe Law Office
Serial Number: 730105
Welcome Doe Law Office (JL)
Login User JL found; UserNo = 1
- UserStatus: Active
- Administrator Status: Enabled
AutoDoc Folder (Standard User):
C:\Users\Jan\Documents\YouWinLaw\AutoDoc
Template Folder (Standard User):
C:\Users\Jan\Documents\YouWinLaw\Templates
QuickLinks:
Template Folder
AutoDoc Folder
Personal & Workgroup Edition:
Database Folder
ODBC Administrator 32Bit
Restart YouWinLaw 2013 to activate any changes
Close
©2013 WinYou Law Inc.
Introduction
This program allows you to manage users, add templates, change billing properties, change main software properties, customize views and use of the software.
You have to be assigned as an administrator (User Management) to have full access to this program.
In the explorer list to the left, you see all possible tasks for administrating and customizing. Select a task on the left pane to see more information (this help screen will automatically be updated).
Customizing the software:
Depending on your software edition you will automatically see the possible options available. Example: if you have purchased the Personal Edition (one user), you cannot add more users. The Add button is greyed out.
Backup:
Do regularly backups of the database and documents!
Restricted use of the administrator:
If you want to restrict certain users to start this program, just remove the wAdm.exe from their program folder. Button Administrator in menu Tools is then automatically disabled.
wAdm 1

AutoText

AutoText

You can use shortcuts in all Text fields of YouWinLaw and in the TimeSheet. You can use the same shortcut for all languages. The shortcut is automatically entered in the correct language (project language). The shortcut text can contain up to 255 characters.



Select the language with the button "Language".

Create Shortcuts

1. Type the new Shortcut in the field "Replace"
2. Type the full text you want to be displayed in the field "With"
3. Click on the button "Add" to save the new shortcut

You can change the language of the shortcut you want to create with the button "Language".

Modify Shortcuts

Double click the desired shortcut in the list. Modify the shortcut and/or the text in the "Replace" and "With" field

Save the modification with "Modify".

Delete Shortcuts

Select the desired shortcut and click on "Delete".

Personal Shortcuts

Activate the check box "Personal AutoCorrect" Now you will see your personal shortcut list.

The personal Shortcut overrule the system shortcuts. To add or change personal shortcuts proceed as described above.

Your administrator can disable the modify of system shortcuts.

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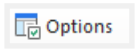
Options: General



File filing If you want to register a new project as a link document, you can enter the path in this field.

Check Reminders Type the interval for checking the reminders.

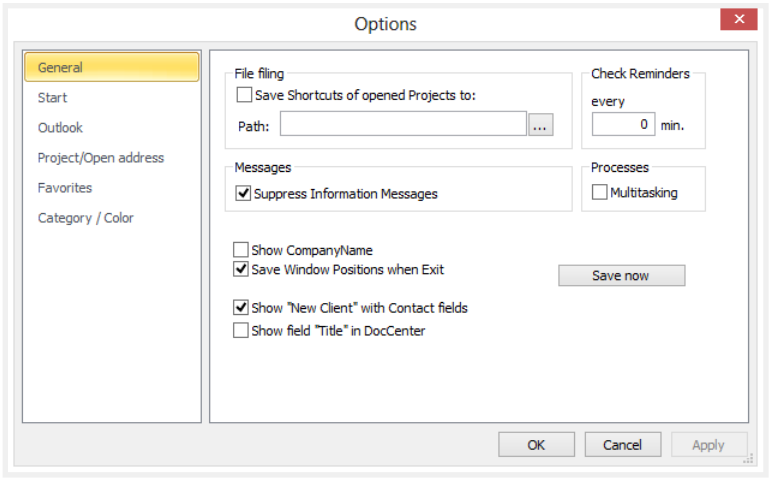
Messages Deactivate the check box, if you want to get more detailed Messages.

Processes System configuration. Do not modify.

Show Company Name Activate the check box if you want the Company name to be displayed, e.g. in the Document Control Center, TimeSheet etc.

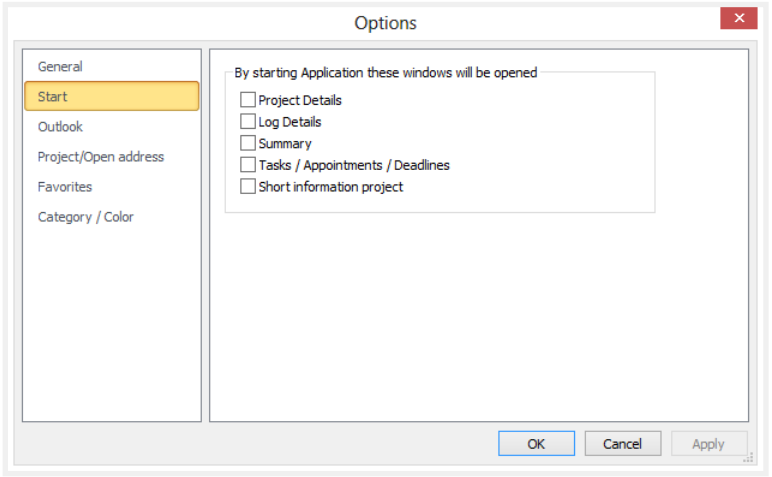
Save Window Position when Exit: If you activate the check box, the window position is saved when you close the program.

Save now: Click here if you want to save the current window position of YouWinLaw.



Options: Start

Activate the check boxes of the desired options.



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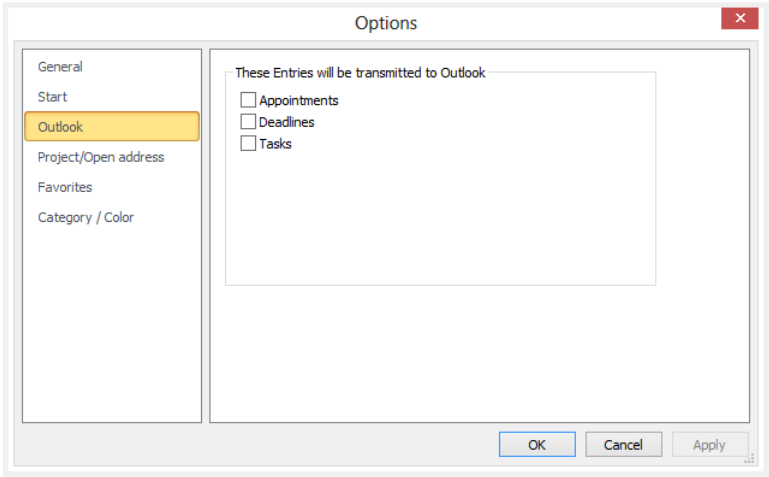
Options: Outlook

Select the Activity Log-types (Appointment, Deadline or Task) you want to be transmitted to Outlook.



Options: Project /Open Address

Search is Case Sensitive Activate if you want the exact typing-mode to be considered.

If marked, show SubProjects Activate if you want the subprojects to be displayed automatically.

Hide SubProject when switching Activate, if you want the subprojects to be hidden, when you go to another project.

Show latest entries Activate, if you want the most recent entries to be displayed on top of the Activity Log.

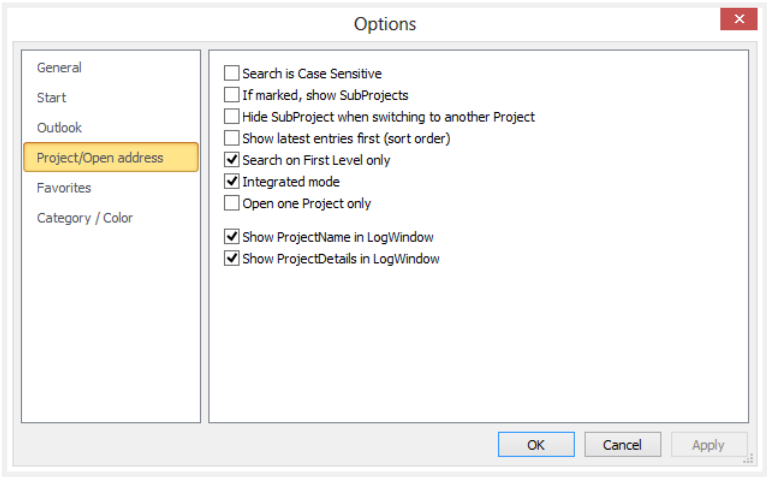
Search on first level only Activate if you want the search to be performed always in the first project level, only.

Integrated mode Activate for integrated project overview.

Show one Project Activate if you want only one project to be opened.

Show ProjectName Activate if you want to display the project name in the Activity Log window.

Show ProjectDetails Activate if you want to display the project details (name, address etc.) in the Activity Log window.



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Options: Favorites not in use

Options: Category / Color Press the button Color to select the color. In the following window you mark the desired color and confirm with OK.

In the field "Sample" a preview is displayed.

You can assign a color to the following items:

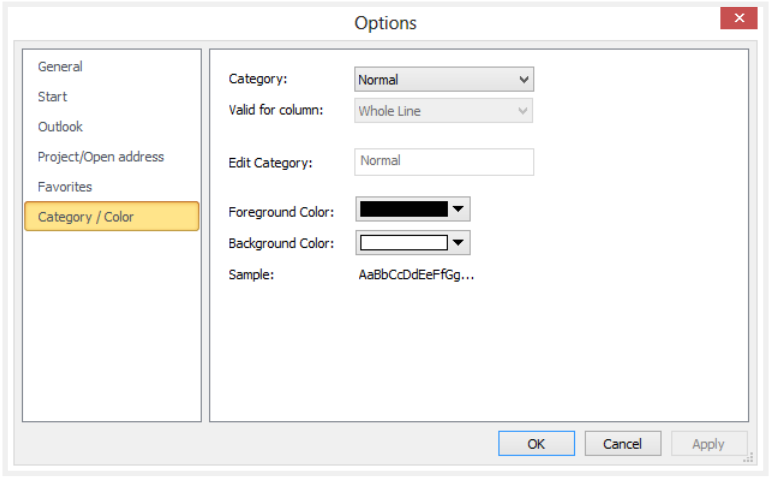
Activity Log status Select the desired Activity Log status - e.g. invoiced.

Valid for column Select the desired item - e.g. Whole Line.

Example Preview with selected color.

Color of text Activate check box to apply the color on the text.

Background color Activate check box to apply the color on the background.



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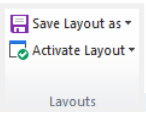
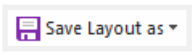
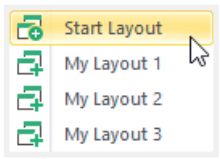


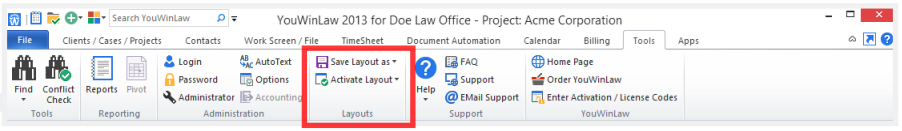
Layouts

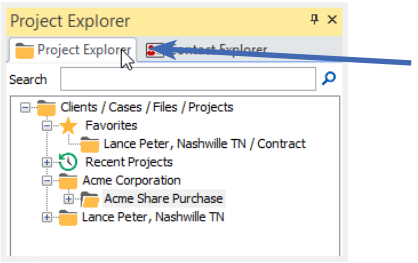
Save Layout

You have the possibility to save and activate different layouts (including the color scheme). "Start layout" is used when the program starts.

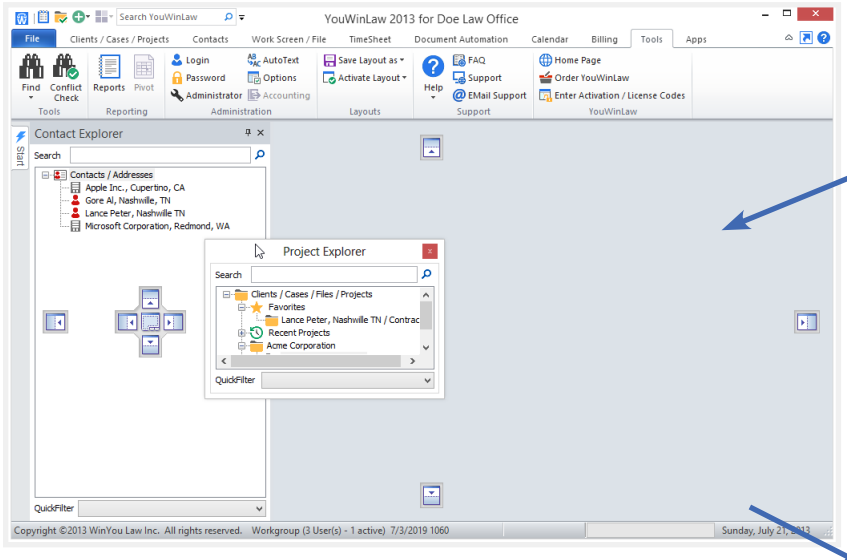


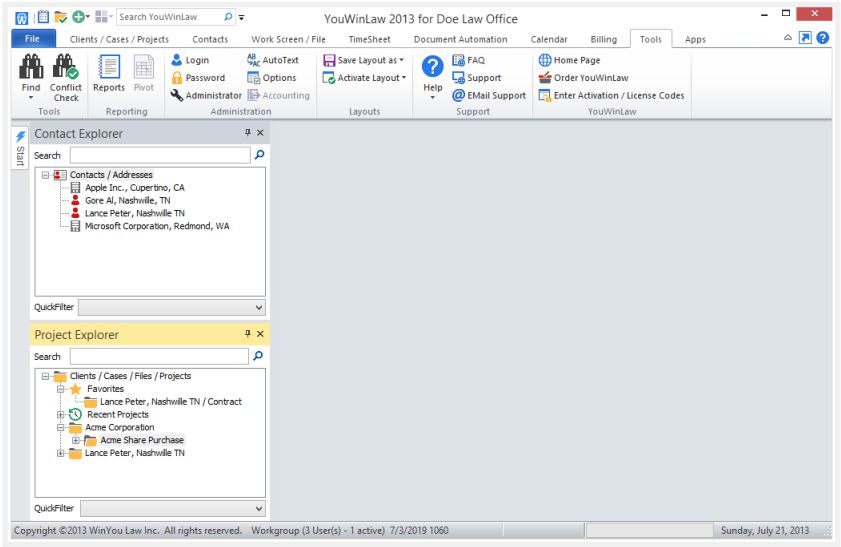


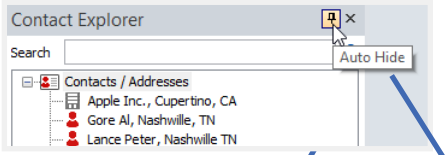




Press and hold the left mouse button on a header (in this case the Project Explorer). Drag the header to the new desired location. Miscellaneous "arrows" appear as a tool for the move. You can draw directly on these arrows, or place the window directly.

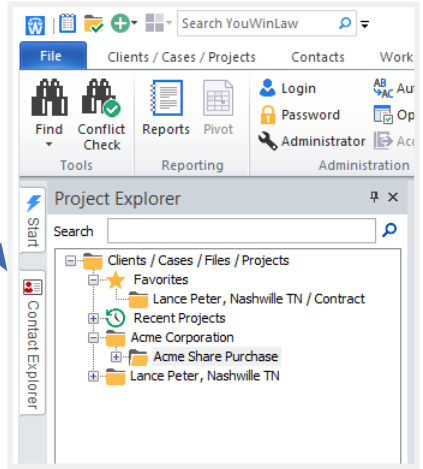






Minimize the window, e.g. as a tab on the side

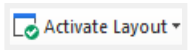
[X] closes the window

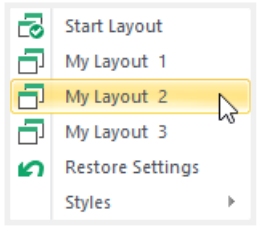


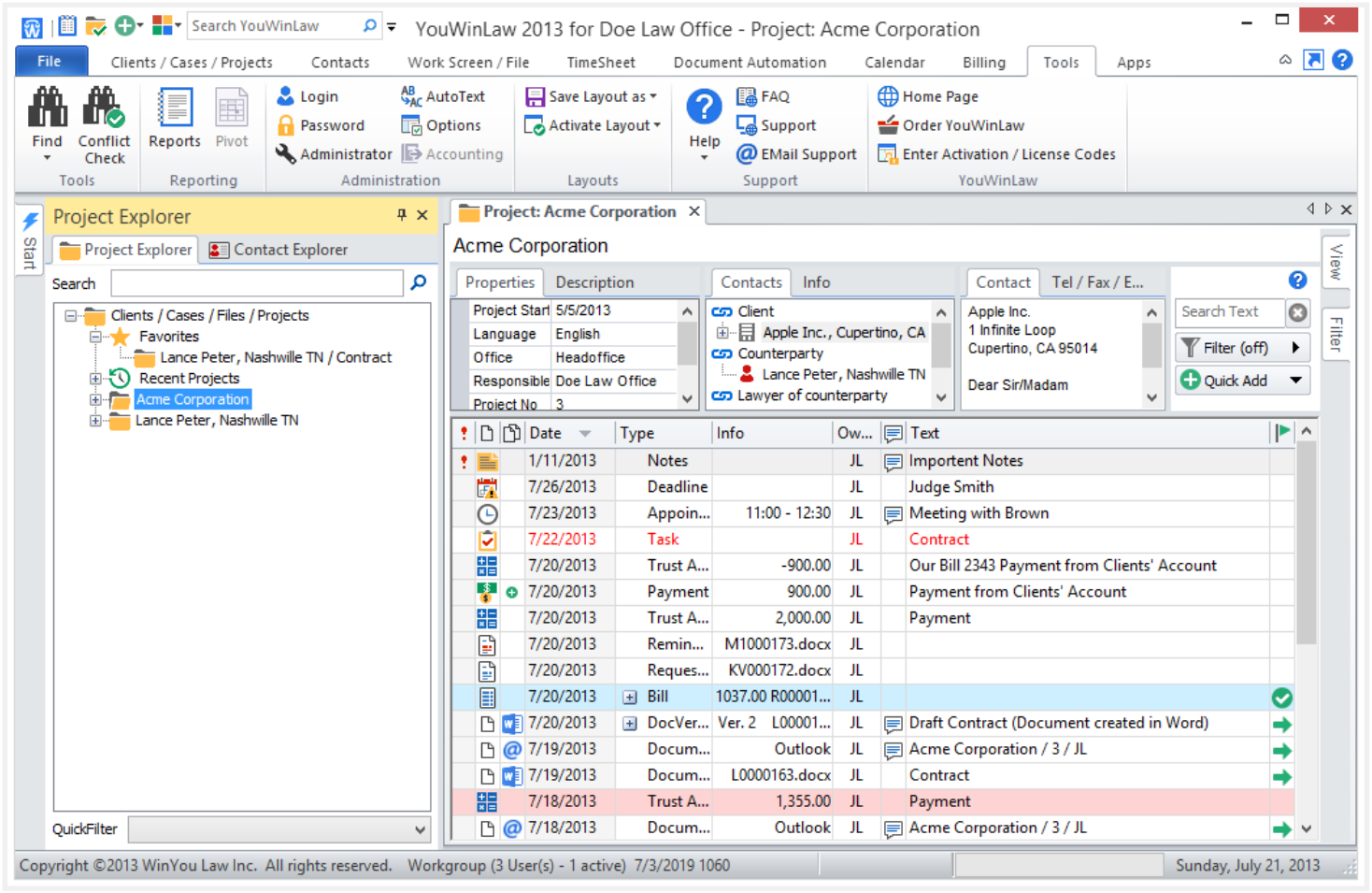
TIP: Use "Activate Layout / Restore Settings" to return YouWinLaw to the original state.

Activate Layout

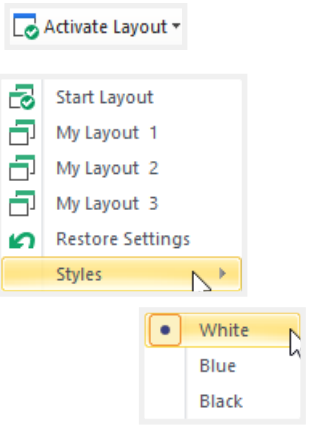
Here you can activate the different layouts of YouWinLaw or restore the default view.

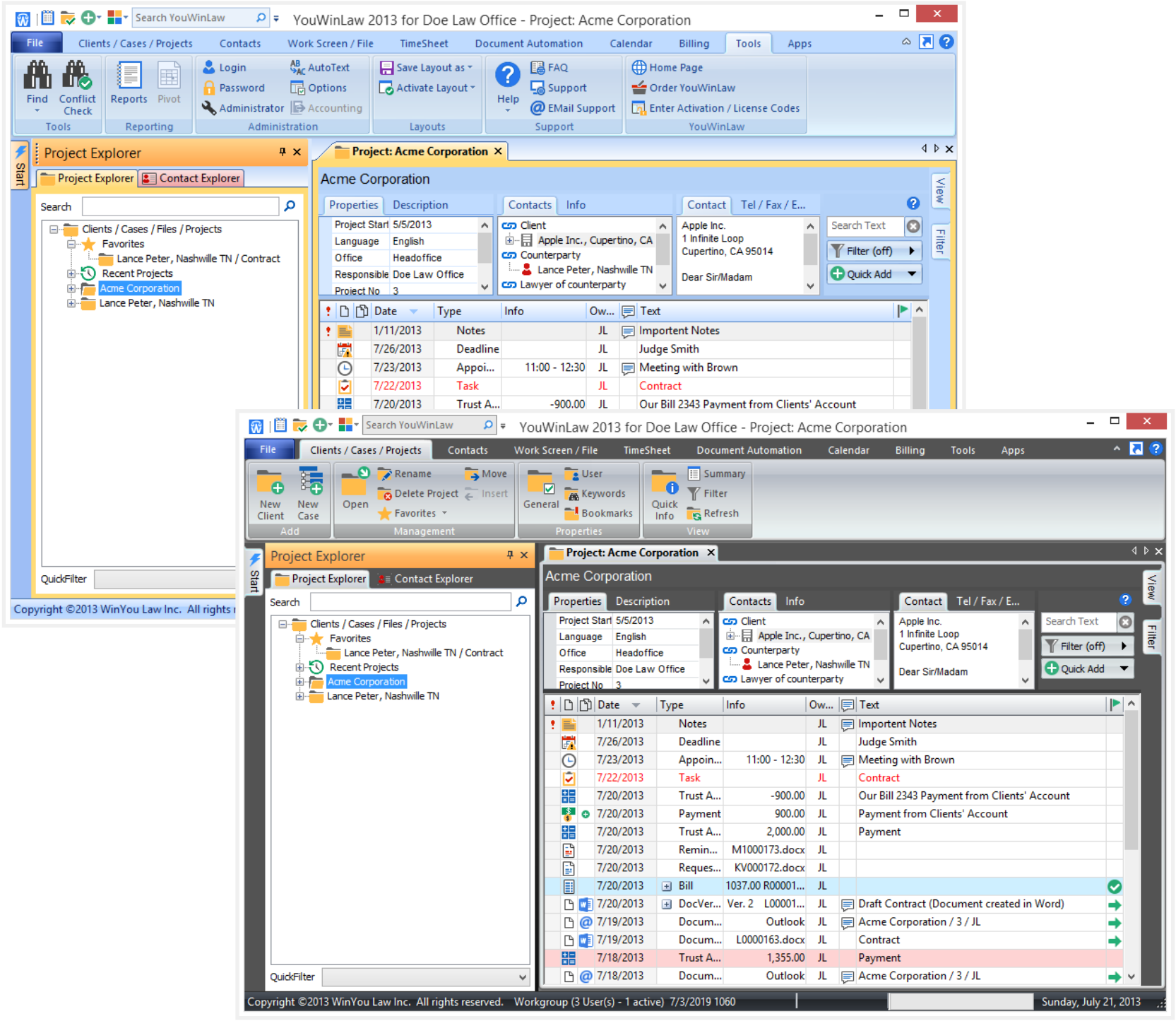


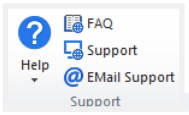




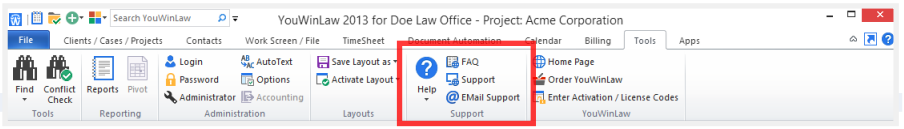
Color Styles



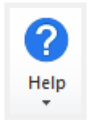


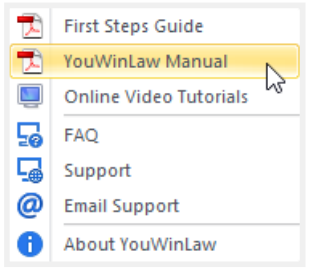


Support



Help





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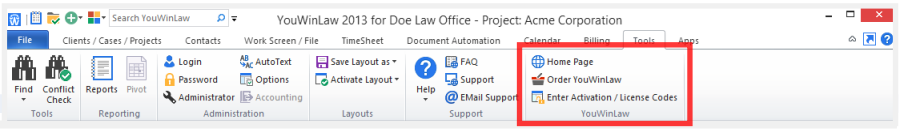
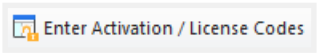
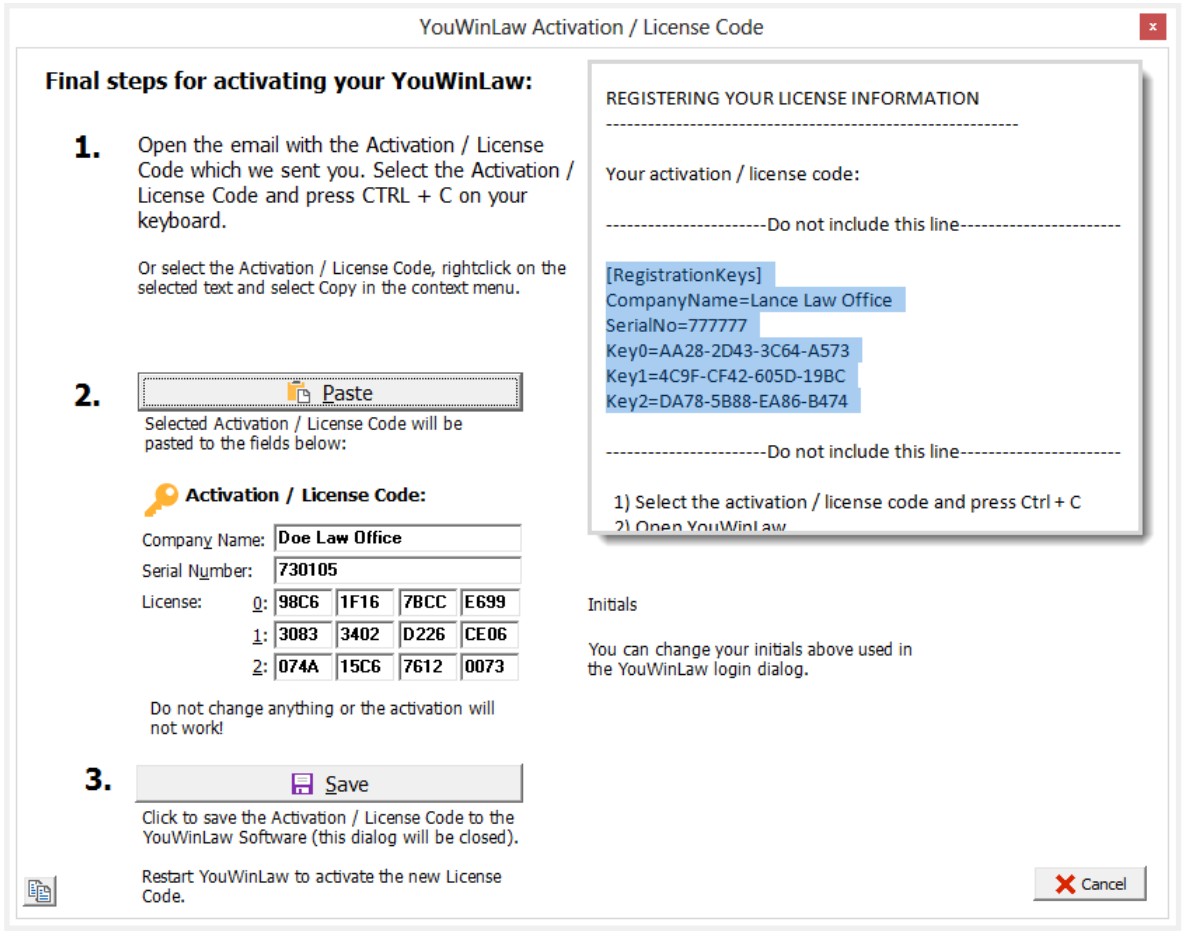
YouWinLaw


YouWinLaw 2013 for Doe Law Office - Project: Acme Corporation
Home Page
Order YouWinLaw
Enter Activation / License Codes
YouWinLaw

Registration Keys

Here you can enter your registration keys




YouWinLaw Activation / License Code
Final steps for activating your YouWinLaw:
1. Open the email with the Activation / License Code which we sent you. Select the Activation / License Code and press CTRL + C on your keyboard.
Or select the Activation / License Code, rightclick on the selected text and select Copy in the context menu.
2. Paste
Selected Activation / License Code will be pasted to the fields below:
Activation / License Code:
Company Name: Doe Law Office
Serial Number: 730105
License: 0: 98C6 1F16 7BCC E699
1: 3083 3402 D226 CE06
2: 074A 15C6 7612 0073
Do not change anything or the activation will not work!
3. Save
Click to save the Activation / License Code to the YouWinLaw Software (this dialog will be closed).
Restart YouWinLaw to activate the new License Code.
REGISTERING YOUR LICENSE INFORMATION
Your activation / license code:
----------Do not include this line----------
[RegistrationKeys]
CompanyName=Lance Law Office
SerialNo=777777
Key0=AA28-2D43-3C64-A573
Key1=4C9F-CF42-605D-19BC
Key2=DA78-5B88-EA86-B474
----------Do not include this line----------
1) Select the activation / license code and press Ctrl + C
Initials
You can change your initials above used in the YouWinLaw login dialog.
Cancel

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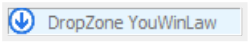
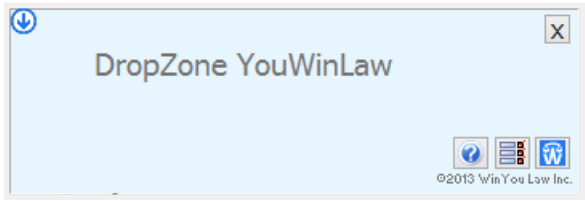
Add On's

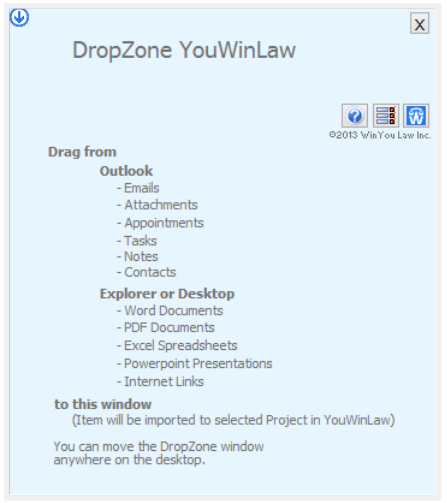
DropZone

DropZone is a window where you can almost drop anything to be inserted (and copied) in YouWinLaw.

Just select an object (e.g. email...) with the mouse and drag it to the DropZone window and release here.





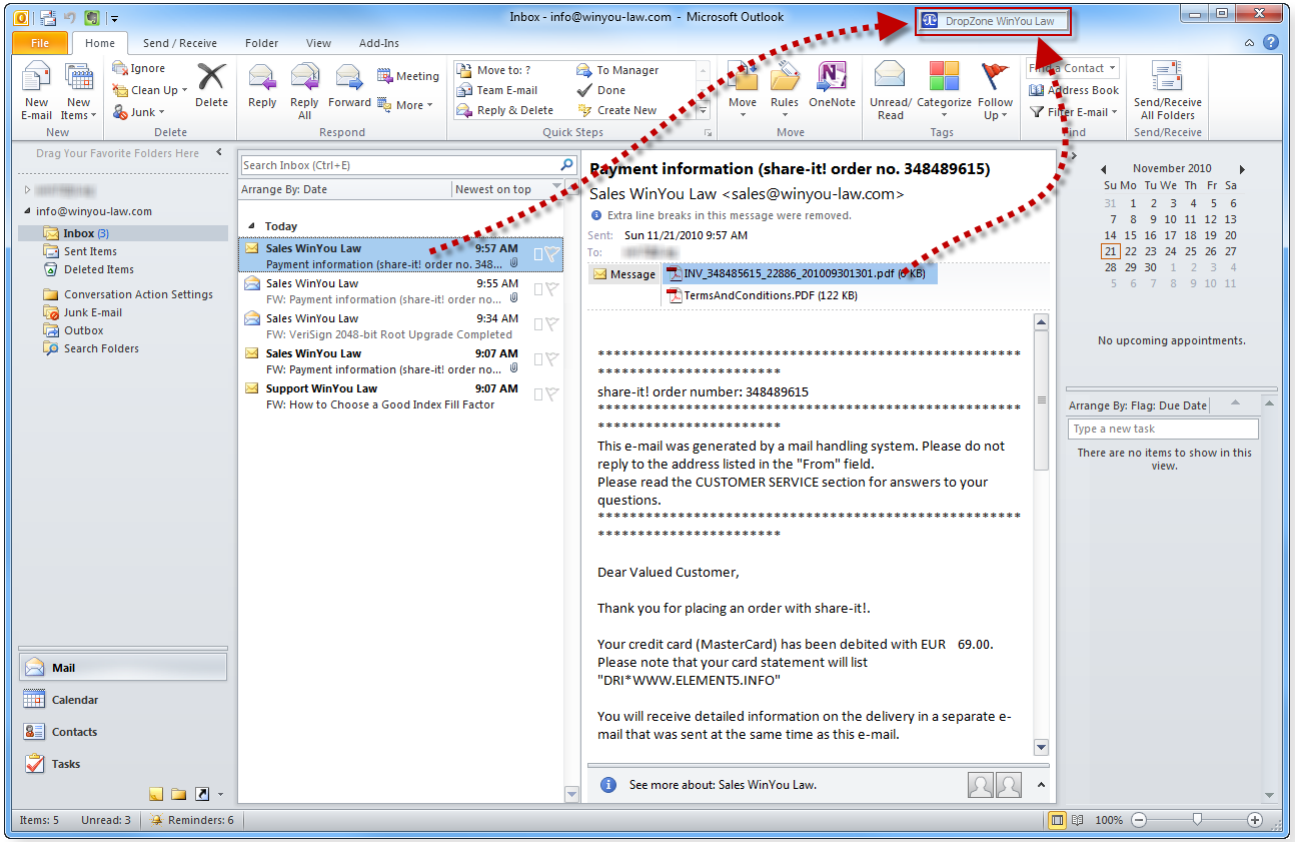


Drag from Outlook

- E-Mails (including attachments)
- Attachments (Documents, excel, pdf etc)
- Past Appointments (will be inserted as fee in YouWinLaw)
- Future Appointments (will be inserted as appointments in YouWinLaw)
- Tasks
- Notes
- Contacts

Outlook e-mails are **copied** into the document folder as .MSG files (message file) into the YouWinLaw document folder (AutoDoc). E-Mails can be opened with a double click and are opened within Outlook.

TIP: E-Mails and Attachments can also be dragged directly to the work screen in YouWinLaw.


Inbox - info@winyou-law.com - Microsoft Outlook
DropZone WinYou Law
Payment information (share-it! order no. 348489615)
Sales WinYou Law <sales@winyou-law.com>
share-it! order number: 348489615
This e-mail was generated by a mail handling system. Please do not reply to the address listed in the "From" field.
Please read the CUSTOMER SERVICE section for answers to your questions.
Dear Valued Customer,
Thank you for placing an order with share-it!.
Your credit card (MasterCard) has been debited with EUR 69.00.
Please note that your card statement will list "DRI*WWW.ELEMENT5.INFO"
You will receive detailed information on the delivery in a separate e-mail that was sent at the same time as this e-mail.

Drag from Windows (desktop, explorer)

- Word Documents
- PDF Documents
- Excel Spreadsheets
- Powerpoint Presentations
- Internet Links

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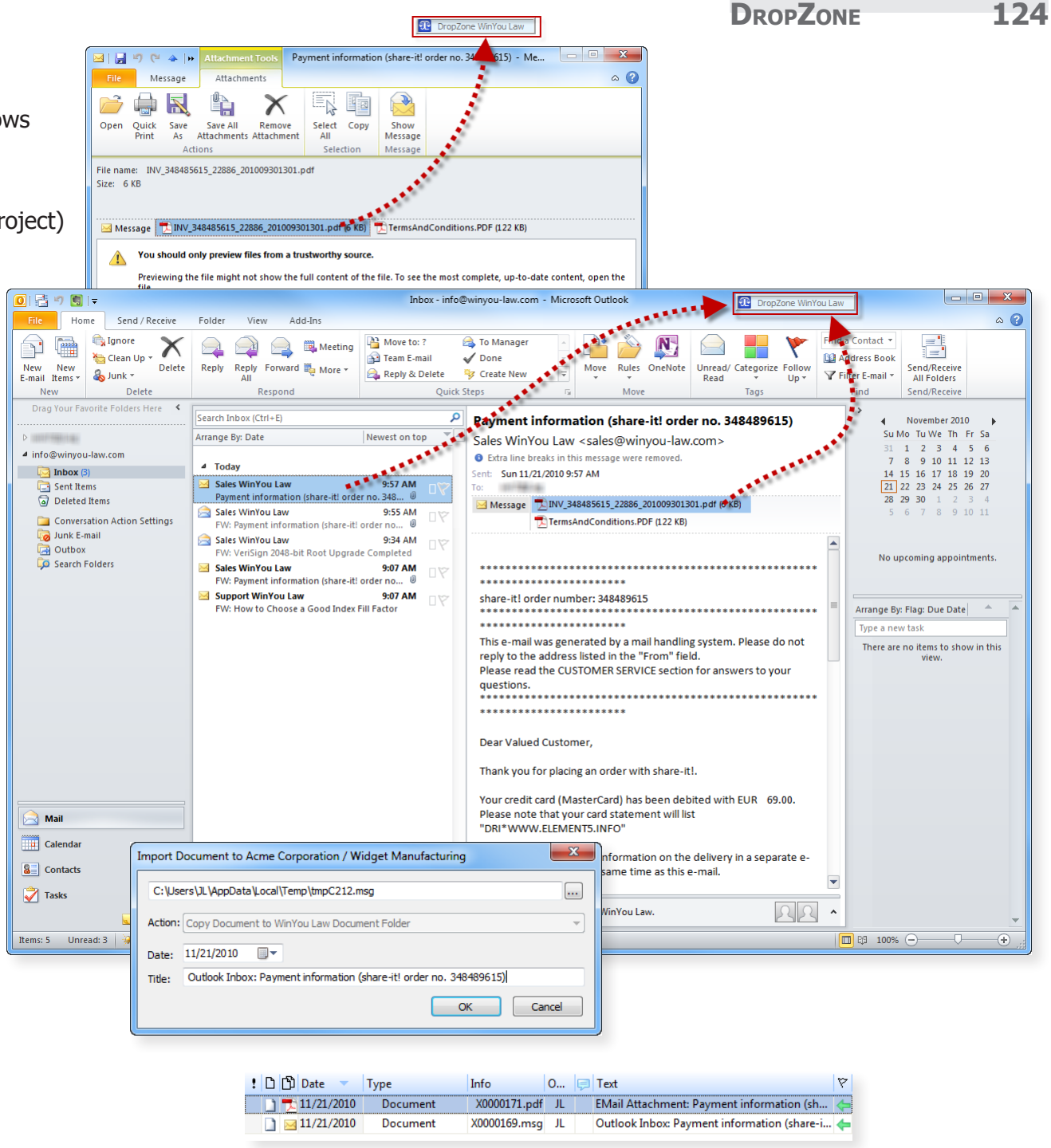
Drag Outlook E-Mails and Attachments

1. Open the corresponding project in YouWinLaw.
2. Drag E-Mail or attachment to the DropZone Windows
3. Click OK on the import Document dialog

Document is inserted in the work screen (in selected project)


DropZone WinYou Law
Payment information (share-it! order no. 348489615)
Sales WinYou Law <sales@winyou-law.com>
Inbox - info@winyou-law.com - Microsoft Outlook
Import Document to Acme Corporation / Widget Manufacturing
C:\Users\JL\AppData\Local\Temp\tmpC212.msg
Action: Copy Document to WinYou Law Document Folder
Date: 11/21/2010
Title: Outlook Inbox: Payment information (share-it! order no. 348489615)
OK
Cancel
Date Type Info O... Text
11/21/2010 Document X0000171.pdf JL EMail Attachment: Payment information (sh...
11/21/2010 Document X0000169.msg JL Outlook Inbox: Payment information (share-i...

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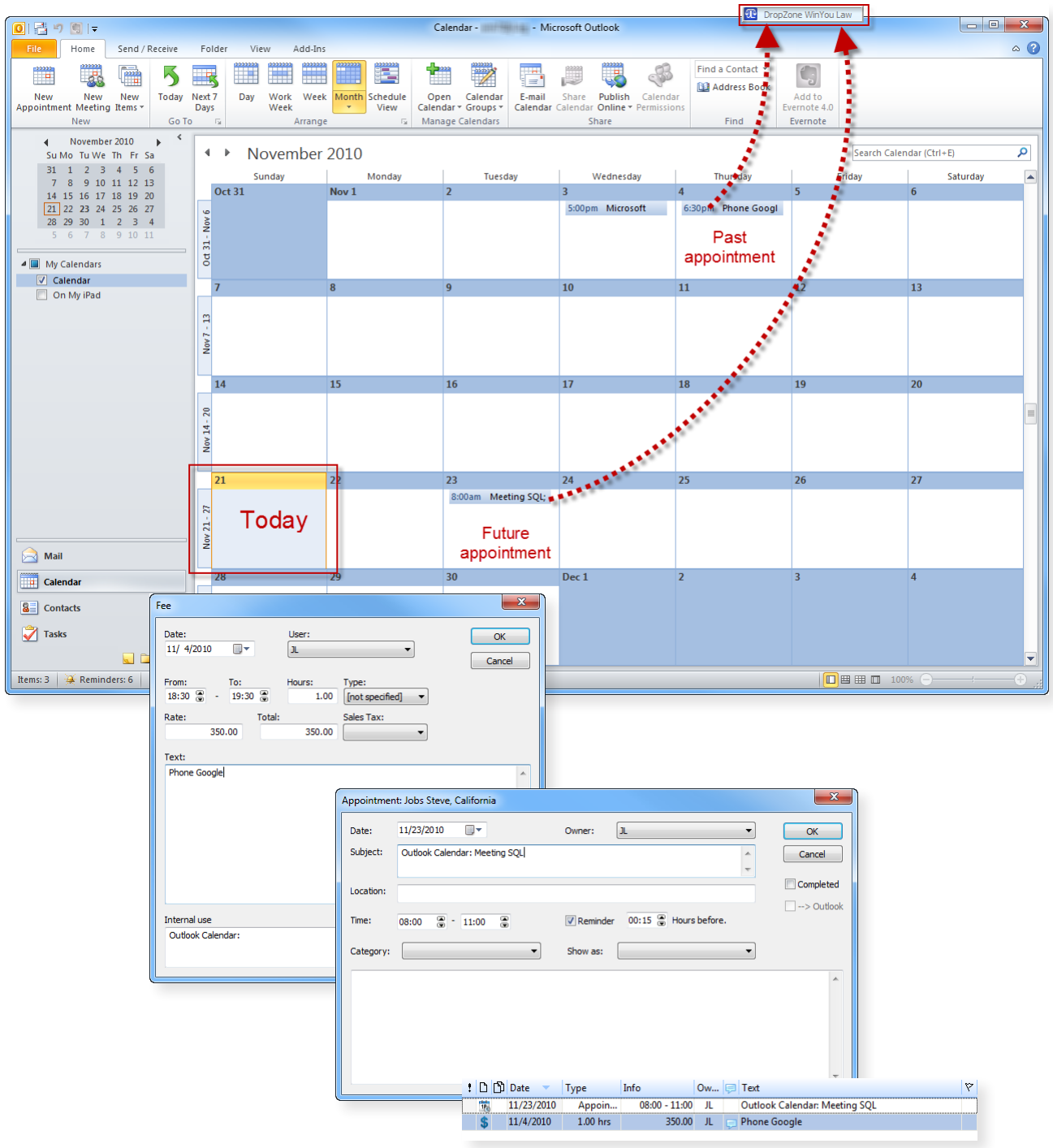
Drag Outlook Appointments

1. Open the corresponding project in YouWinLaw.
2. Drag the appointment to the DropZone Windows
3. Click OK on the import dialog

TIP: If the appointment is in the past, YouWinLaw will automatically insert a Fee else an appointment is inserted.



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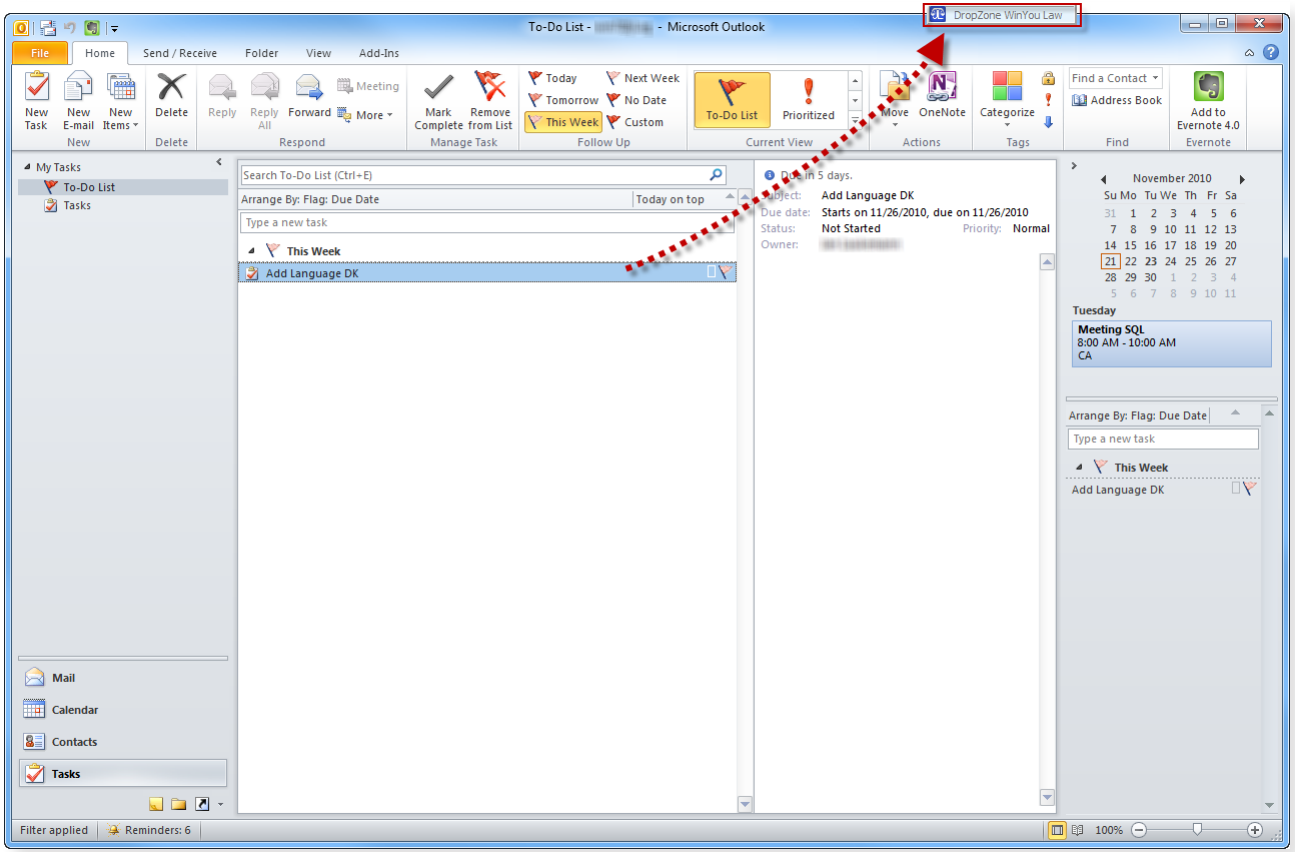
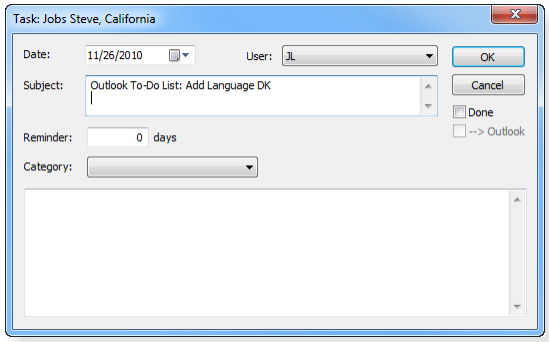
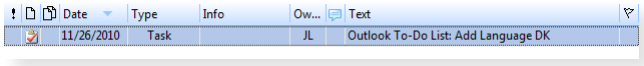
Drag Outlook Tasks

1. Open the corresponding project in YouWinLaw.
2. Drag the task to the DropZone Windows
3. Click OK on the import dialog

Task is inserted in the work screen (in selected project)







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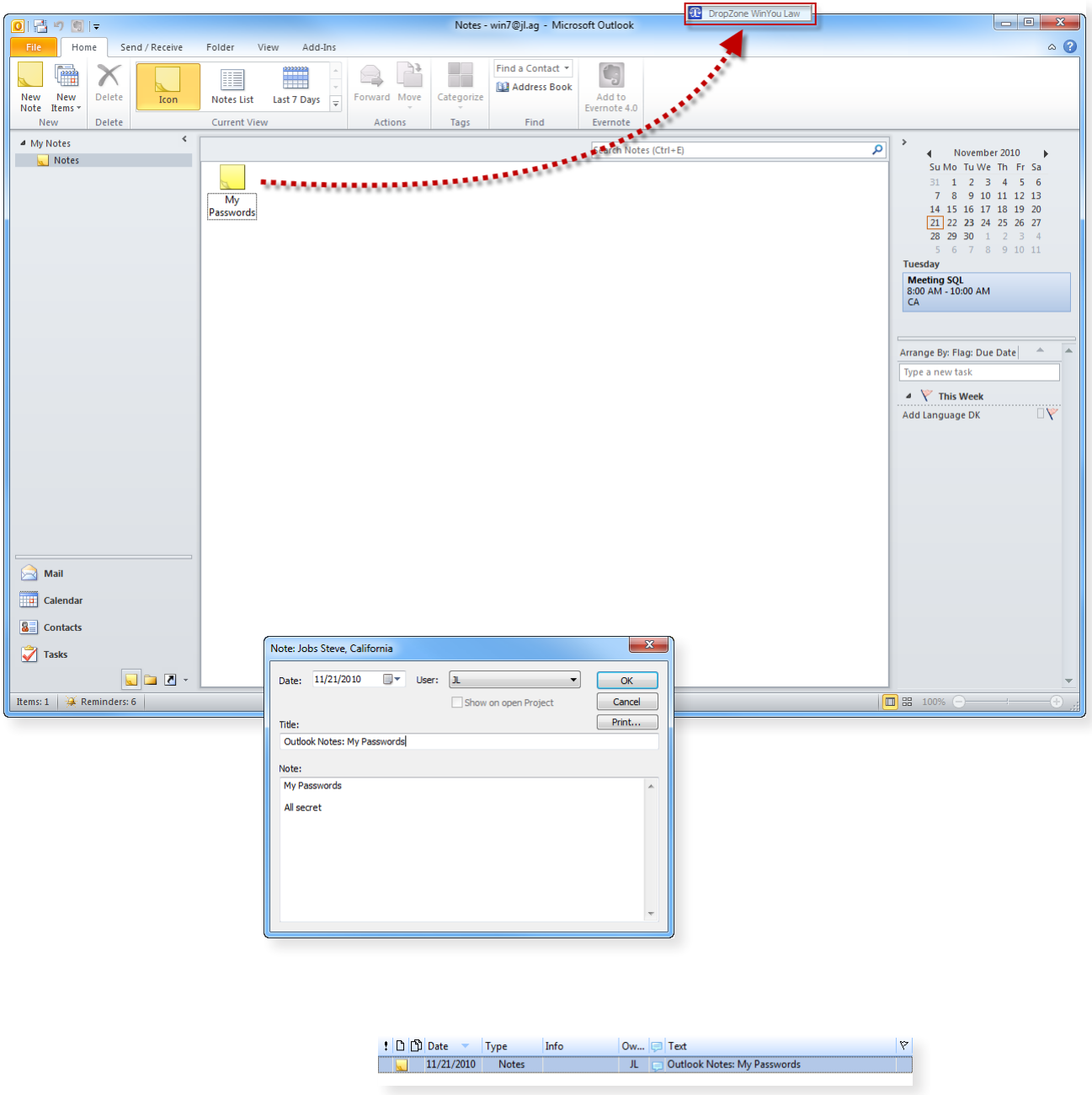
Drag Outlook Notes

1. Open the corresponding project in YouWinLaw.
2. Drag the note to the DropZone Windows
3. Click OK on the import dialog

Note is inserted in the work screen (in selected project)



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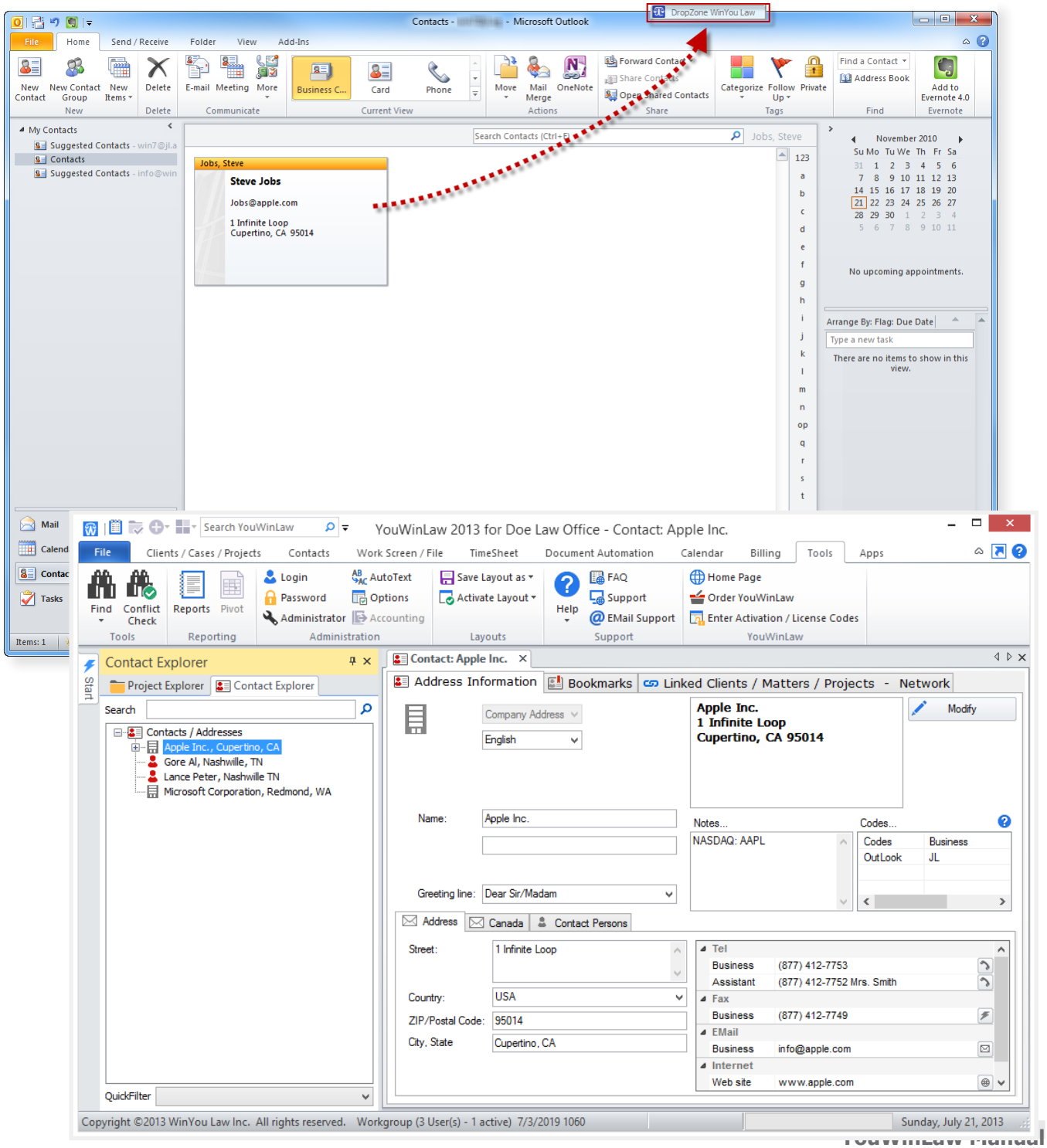
Drag Outlook Contacts

1. Drag the Contact to the DropZone Windows

TIP: Imported Contact is shown in bold in the You-WinLaw Contact Explorer until next refresh.



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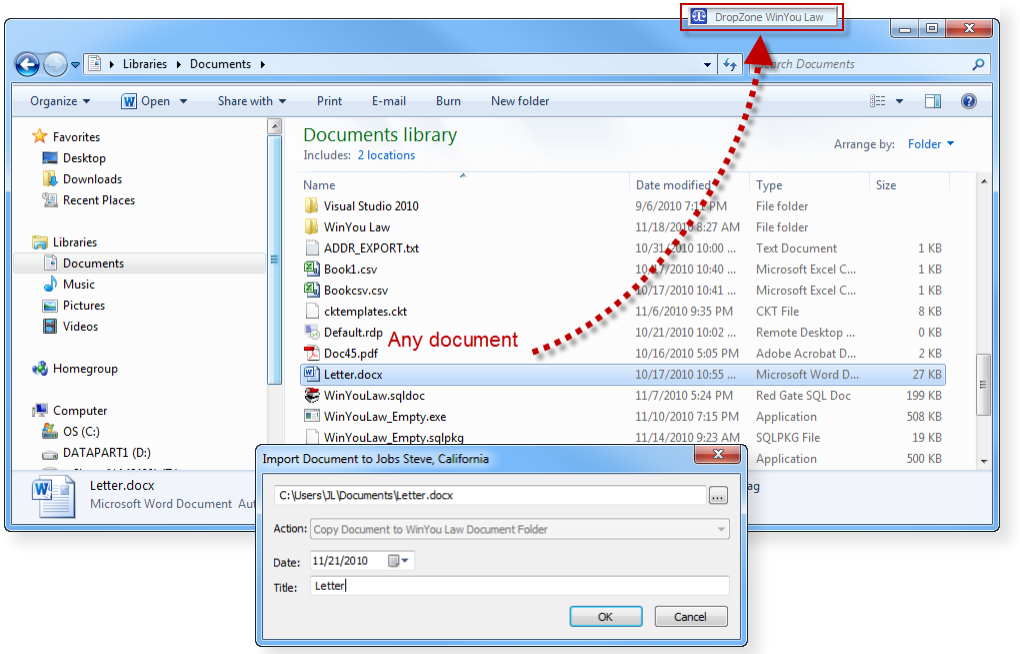
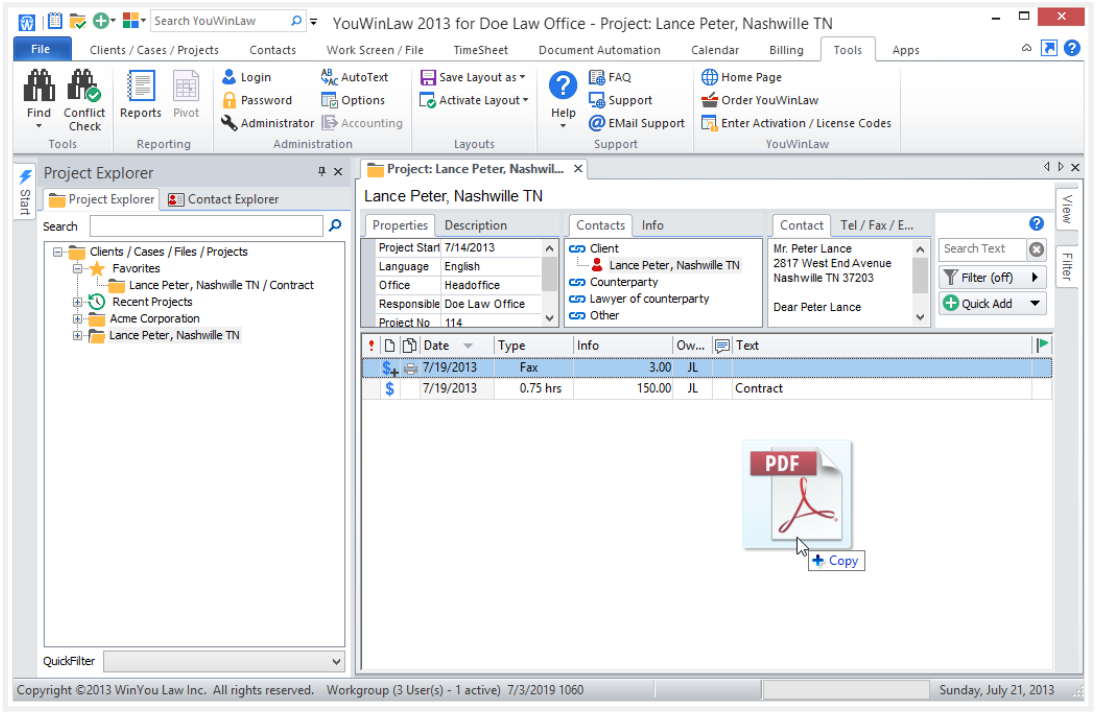
Drag Documents, Files, Links...

1. Open the corresponding project in YouWinLaw.
2. Drag the document to the DropZone Windows
3. Click OK on the import dialog

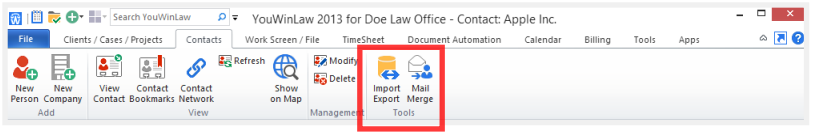
Document / file is inserted in the work screen (in selected project)



TIP: You can also drag a document or file direct to the work screen. In the Import Dialog you have now the possibility to select the option "Create a Link to Document": The document is not copied to the YouWinLaw folder, only the link to the physical document is inserted in the work screen.



Import and Export

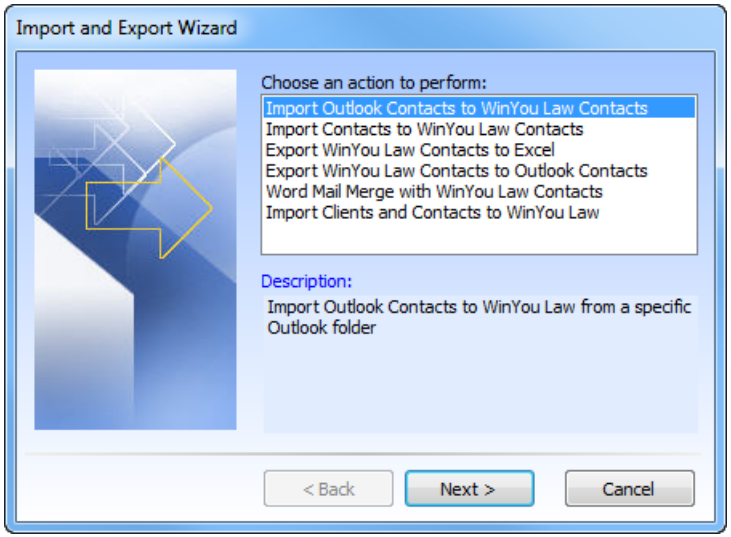


You will find the Wizard in the menubar Contacts.

Import

You can import data from Microsoft Outlook or directly from a file or database. Following formats are available:

- Outlook Contacts (you have the possibility to select the Outlook Contacts folder) page 131
- File formats like csv, txt, doc (Word), xls (Excel), odt (Open Office), html, xml... page 132
- Database formats like mdb (MS Access), Paradox, DBase, Advantage, DBIsam, windows address book, Skype log or any other database via ADO Connection


Import and Export Wizard
Choose an action to perform:
Import Outlook Contacts to WinYou Law Contacts
Import Contacts to WinYou Law Contacts
Export WinYou Law Contacts to Excel
Export WinYou Law Contacts to Outlook Contacts
Word Mail Merge with WinYou Law Contacts
Import Clients and Contacts to WinYou Law
Description:
Import Outlook Contacts to WinYou Law from a specific Outlook folder
< Back
Next >
Cancel

You can control the result in YouWinLaw directly and have the possibility to undo the import (keep the import dialog open). You can import clients and contacts at the same time or generate clients autmatically from your contacts (page 135).

Export

Following possibilities are available:

- From YouWinLaw Contacts to Outlook Contacts (you can select the Outlook folder)
- From YouWinLaw Contacts to Excel page 139
- From YouWinLaw Contacts to Word Mail Merge (all automatic, you can directly create the text and insert YouWinLaw fields like name or address)

YouWinLaw contains much more fields as Outlook, therefore not all fields in YouWinLaw will be found in an Outlook Contact.

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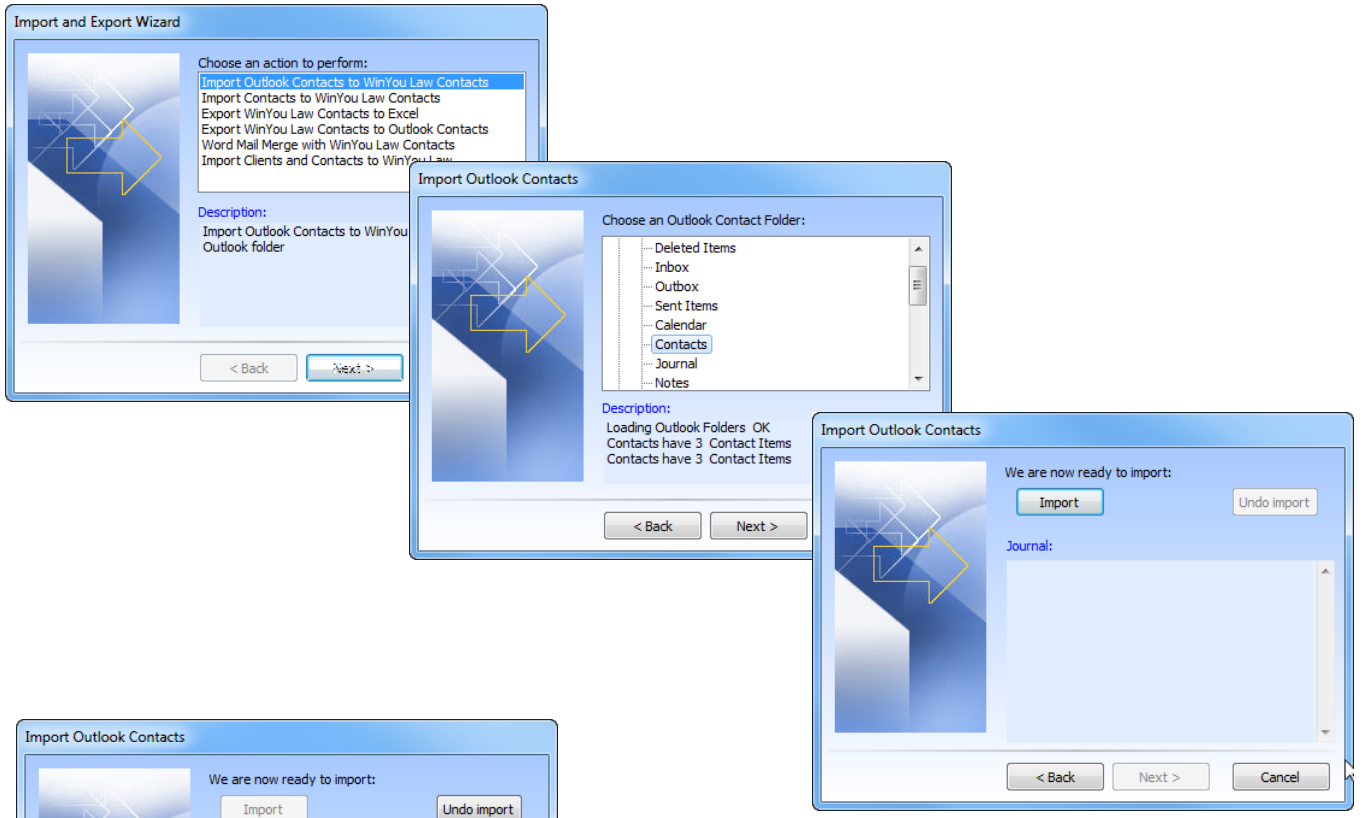
Import Outlook Contacts

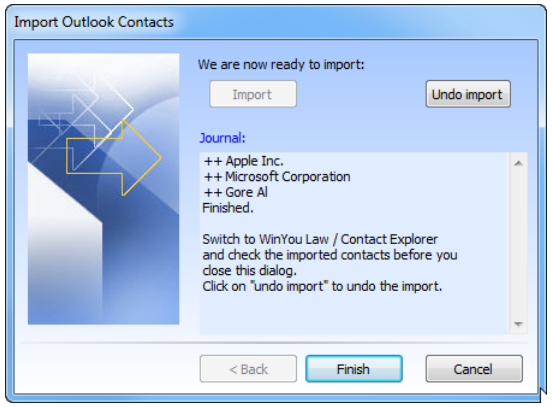
1. Select "Import Outlook Contacts to YouWinLaw Contacts" and click on "Next"

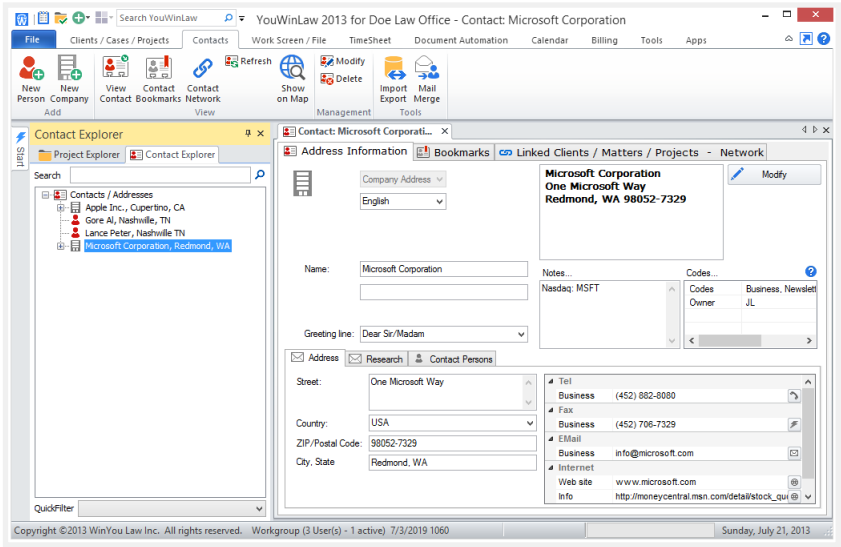
2. Select the Outlook Contacts folder

3. Click on the "Import" button



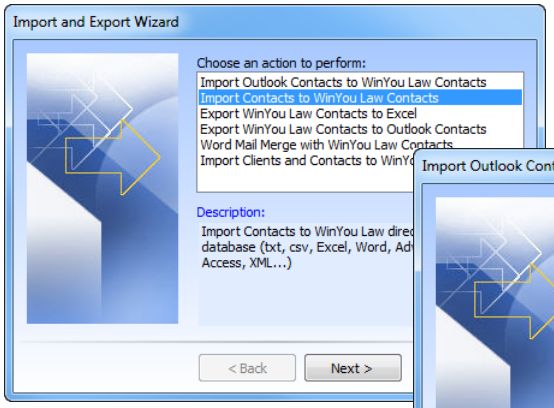
Before you close this dialog, switch to YouWinLaw and check the imported contacts. If you are not satisfied you can switch back to the import dialog (shown here) and click on the "Undo Import" button to undo the import.



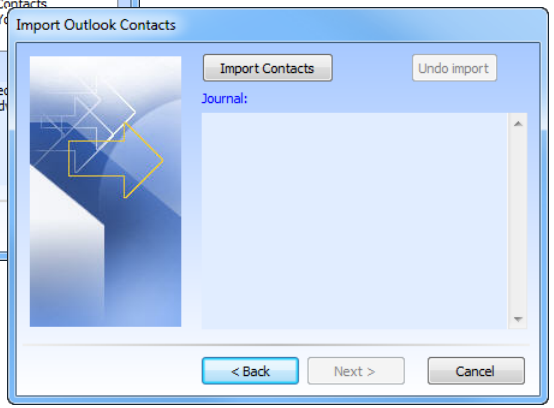


Import Contacts from a file or database

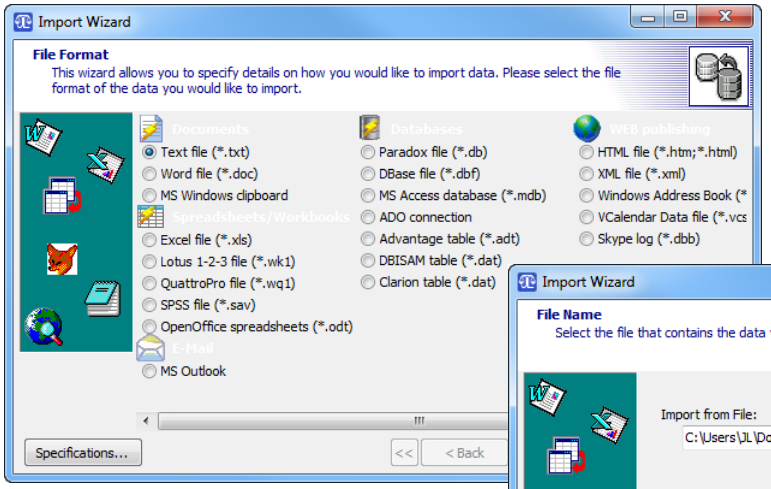
1. Select "Import Contacts to WinYou Law Contacts" and click on "Next"


Import and Export Wizard
Choose an action to perform:
Import Outlook Contacts to WinYou Law Contacts
Import Contacts to WinYou Law Contacts
Export WinYou Law Contacts to Excel
Export WinYou Law Contacts to Outlook Contacts
Word Mail Merge with WinYou Law Contacts
Import Clients and Contacts to WinYo
Description:
Import Contacts to WinYou Law dire
database (txt, csv, Excel, Word, Ad
Access, XML...)
< Back
Next >

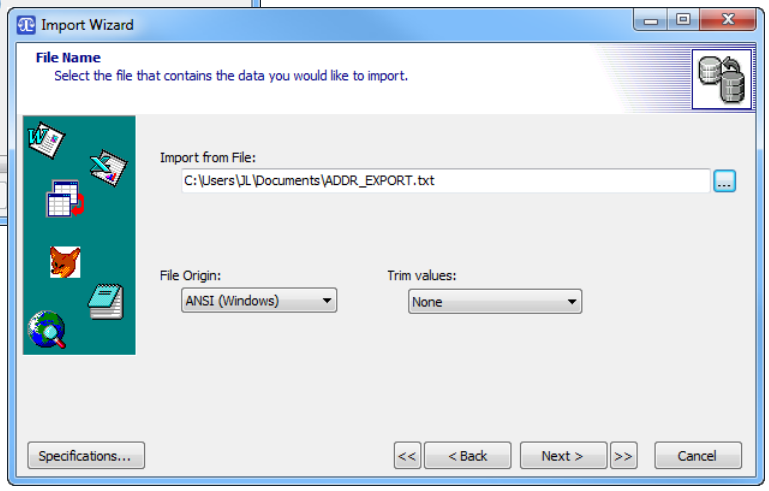
2. Click on "Import Contacts" button



3. Select import format



4. Select file / folder (or database)



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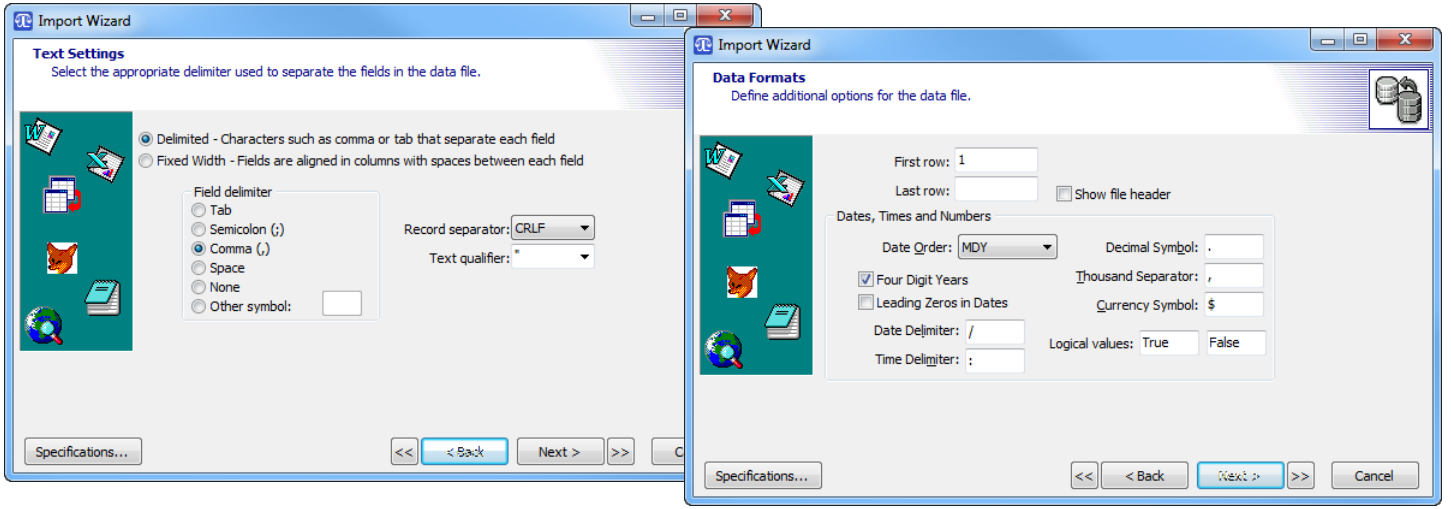
5. Select delimiter (txt file)

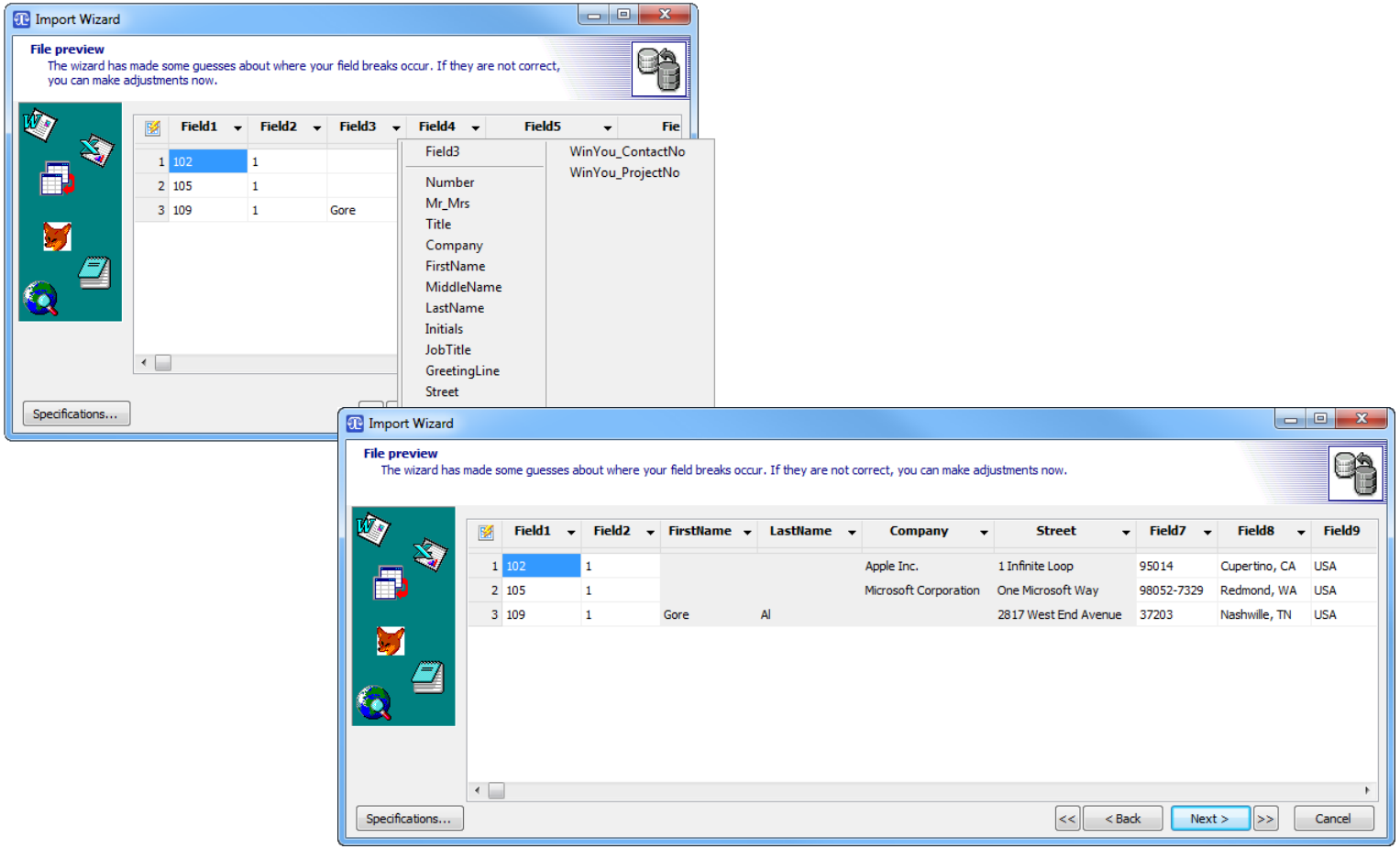
6. Select data formats



7. In the file preview click on a header and select a corresponding field for the YouWinLaw database

Do this for all fields that you want to import

When finished click on "Next"


Import Wizard
File preview
The wizard has made some guesses about where your field breaks occur. If they are not correct, you can make adjustments now.
Field1 Field2 Field3 Field4 Field5
1 102 1
2 105 1
3 109 1 Gore
Field3
Number
Mr_Mrs
Title
Company
FirstName
MiddleName
LastName
Initials
JobTitle
GreetingLine
Street
WinYou_ContactNo
WinYou_ProjectNo
Specifications...
Import Wizard
File preview
The wizard has made some guesses about where your field breaks occur. If they are not correct, you can make adjustments now.
Field1 Field2 FirstName LastName Company Street Field7 Field8 Field9
1 102 1 Apple Inc. 1 Infinite Loop 95014 Cupertino, CA USA
2 105 1 Microsoft Corporation One Microsoft Way 98052-7329 Redmond, WA USA
3 109 1 Gore Al 2817 West End Avenue 37203 Nashville, TN USA
Specifications...
<< < Back Next > >> Cancel

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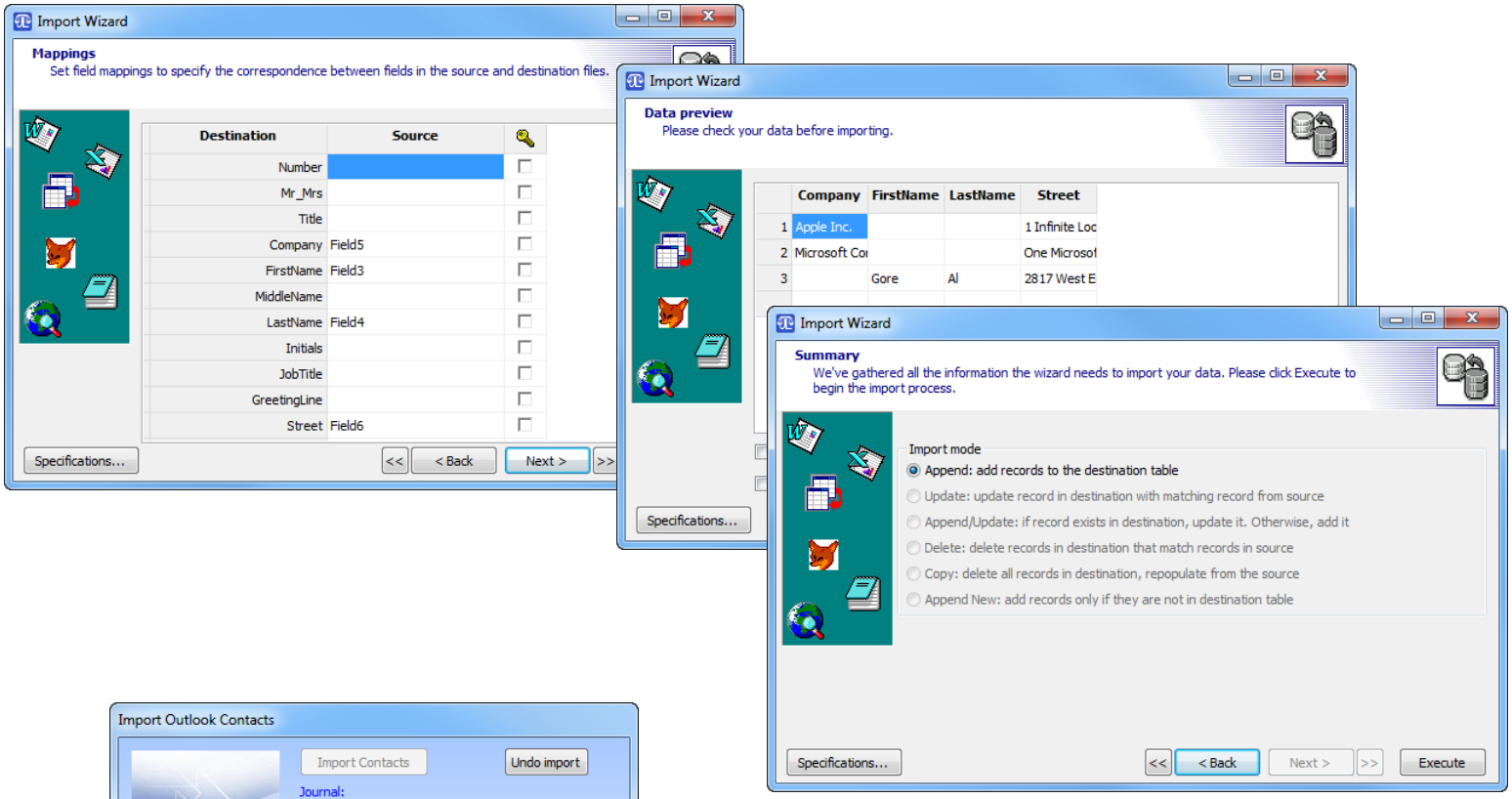
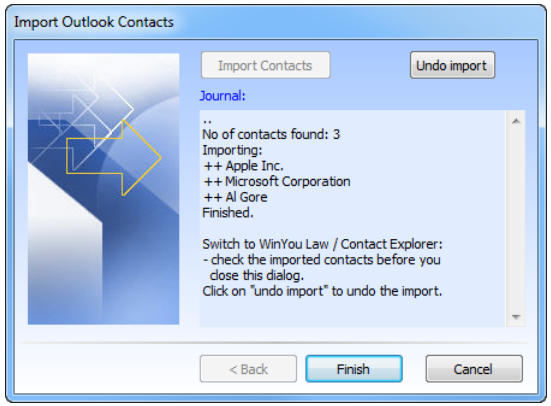
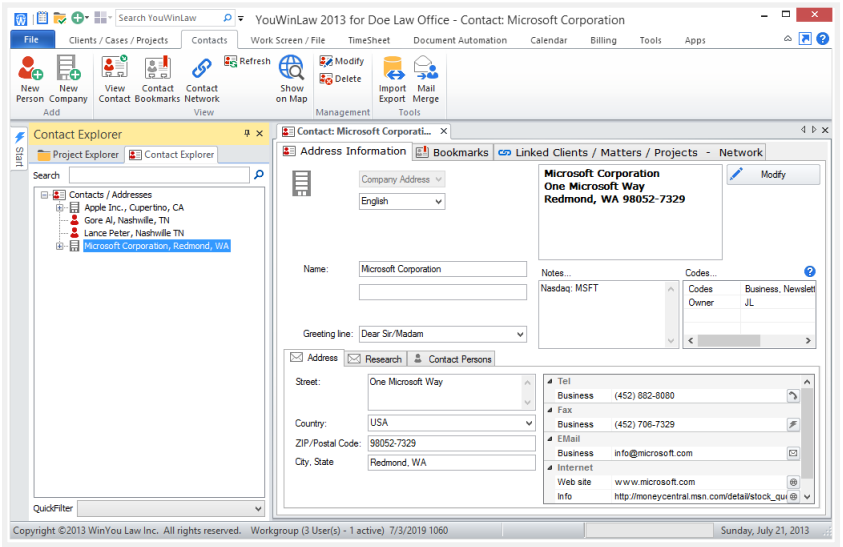
On the next screens you can check the results. Use "back" to correct anything before the final import to YouWinLaw (with the "Execute" button



Before you close this dialog, switch to YouWinLaw and check the imported contacts. If you are not satisfied you can switch back to the import dialog (shown here) and click on the "Undo Import" button to undo the import.





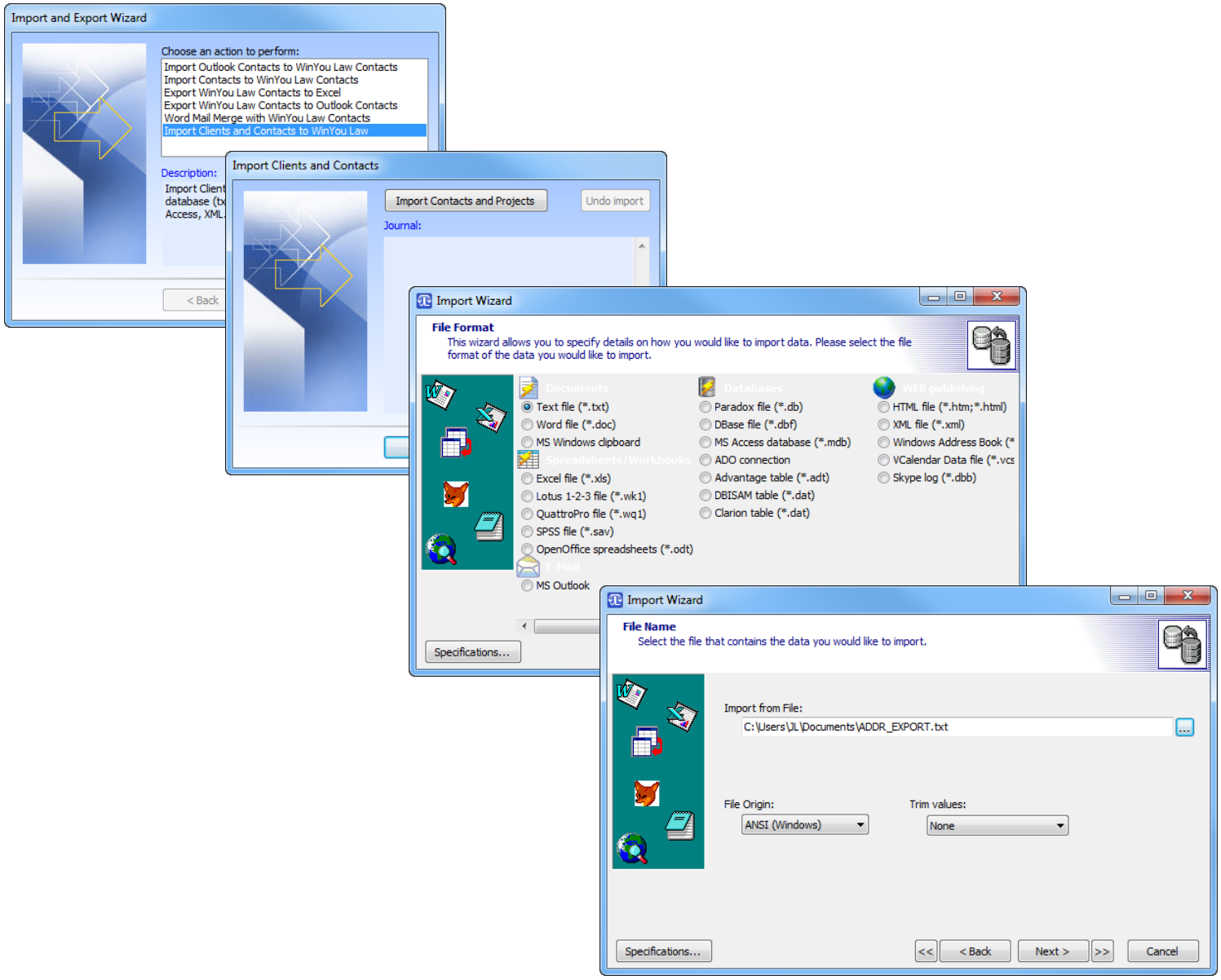
Import Clients and Contacts from a file or database

1. Select "Import Clients and Contacts to YouWinLaw" and click on "Next"

2. Click on "Import Contacts and Projects" button

3. Select import format

4. Select file / folder (or database)



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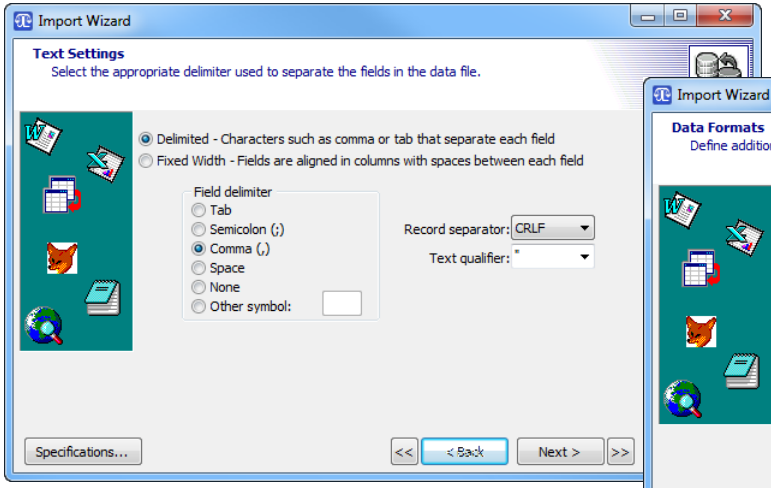
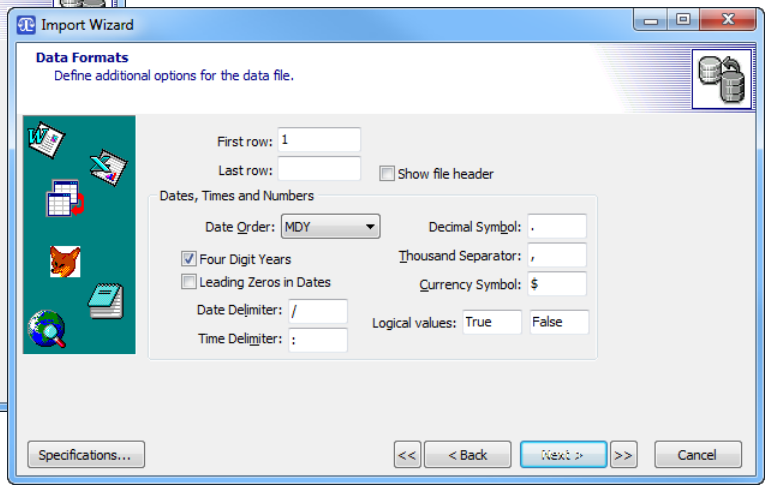
5. Select delimiter (txt file)



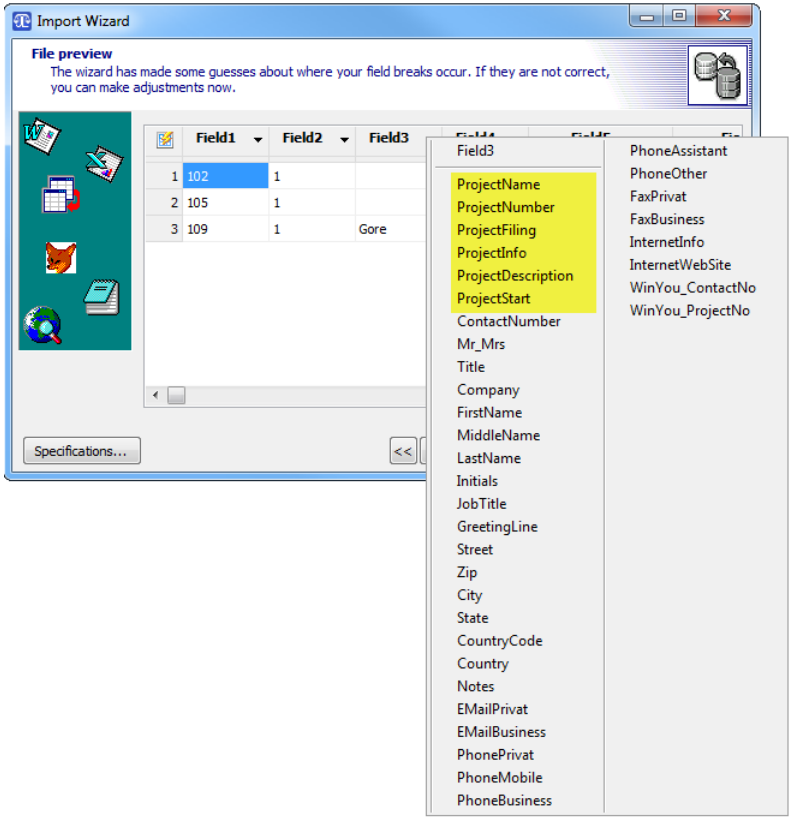
6. Select data formats



In the file preview click on a header and select a corresponding field for the YouWinLaw database

Do this for all fields that you want to import

When finished click on "Next"



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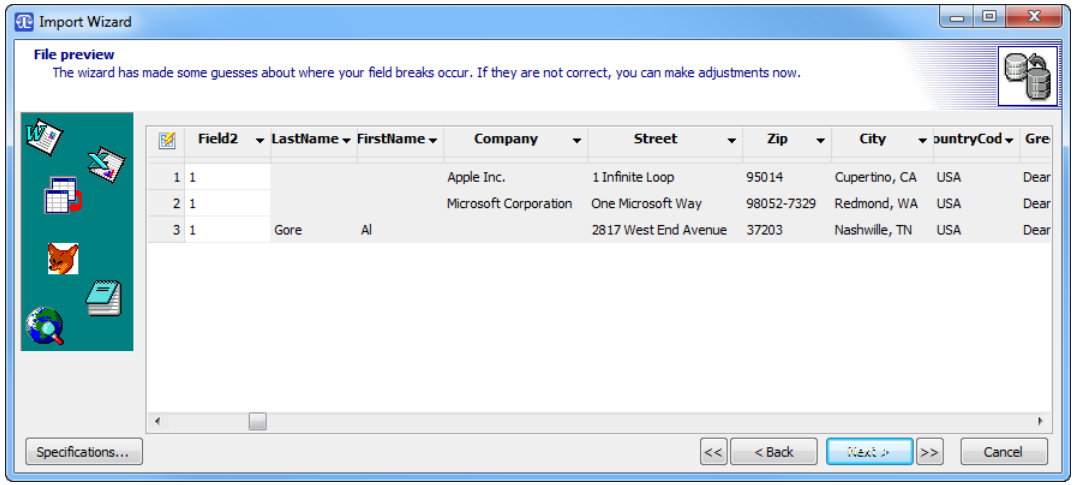
8. In the next screens you can check the results. Use "back" to correct anything before the final import to YouWinLaw (with the "Execute" button


Import Wizard
File preview
The wizard has made some guesses about where your field breaks occur. If they are not correct, you can make adjustments now.
Field2
LastName
FirstName
Company
Street
Zip
City
ountryCod
Gre
1 1 Apple Inc. 1 Infinite Loop 95014 Cupertino, CA USA Dear
2 1 Microsoft Corporation One Microsoft Way 98052-7329 Redmond, WA USA Dear
3 1 Gore Al 2817 West End Avenue 37203 Nashwille, TN USA Dear
Specifications...
<< < Back Next > >> Cancel

If you do not have a Client Name, keep the ProjectName field empty.

TIP: If you leave the ProjectName (Client Name) field empty, the import wizard will fill the ProjectName automatically.

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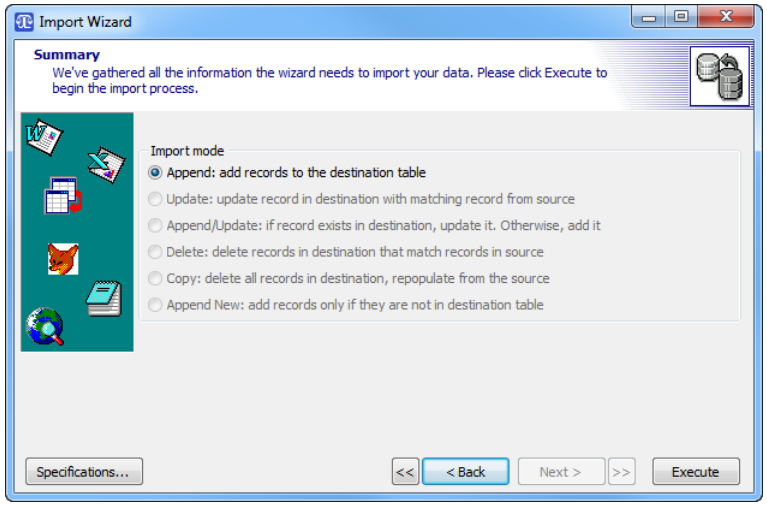
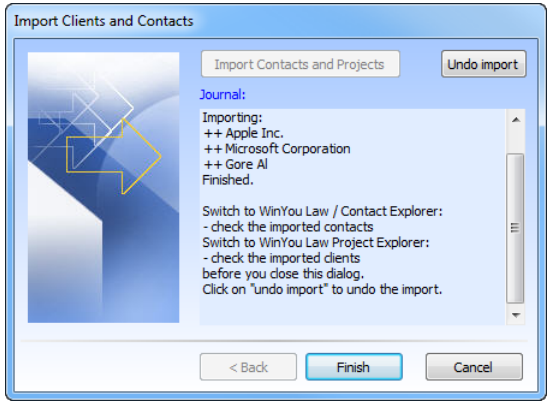
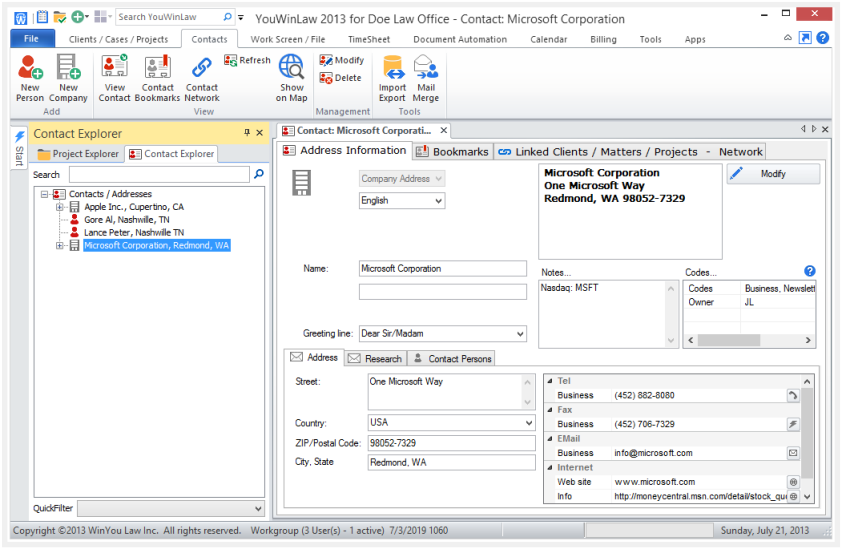

Import Wizard
Summary
We've gathered all the information the wizard needs to import your data. Please click Execute to begin the import process.
Import mode
Append: add records to the destination table
Update: update record in destination with matching record from source
Append/Update: if record exists in destination, update it. Otherwise, add it
Delete: delete records in destination that match records in source
Copy: delete all records in destination, repopulate from the source
Append New: add records only if they are not in destination table
Specifications...
<<
< Back
Next >
>>
Execute

9. Before you close this dialog, switch to YouWinLaw and check the imported clients and contacts. If you are not satisfied you can switch back to the import dialog (shown here) and click on the "Undo Import" button to undo the import

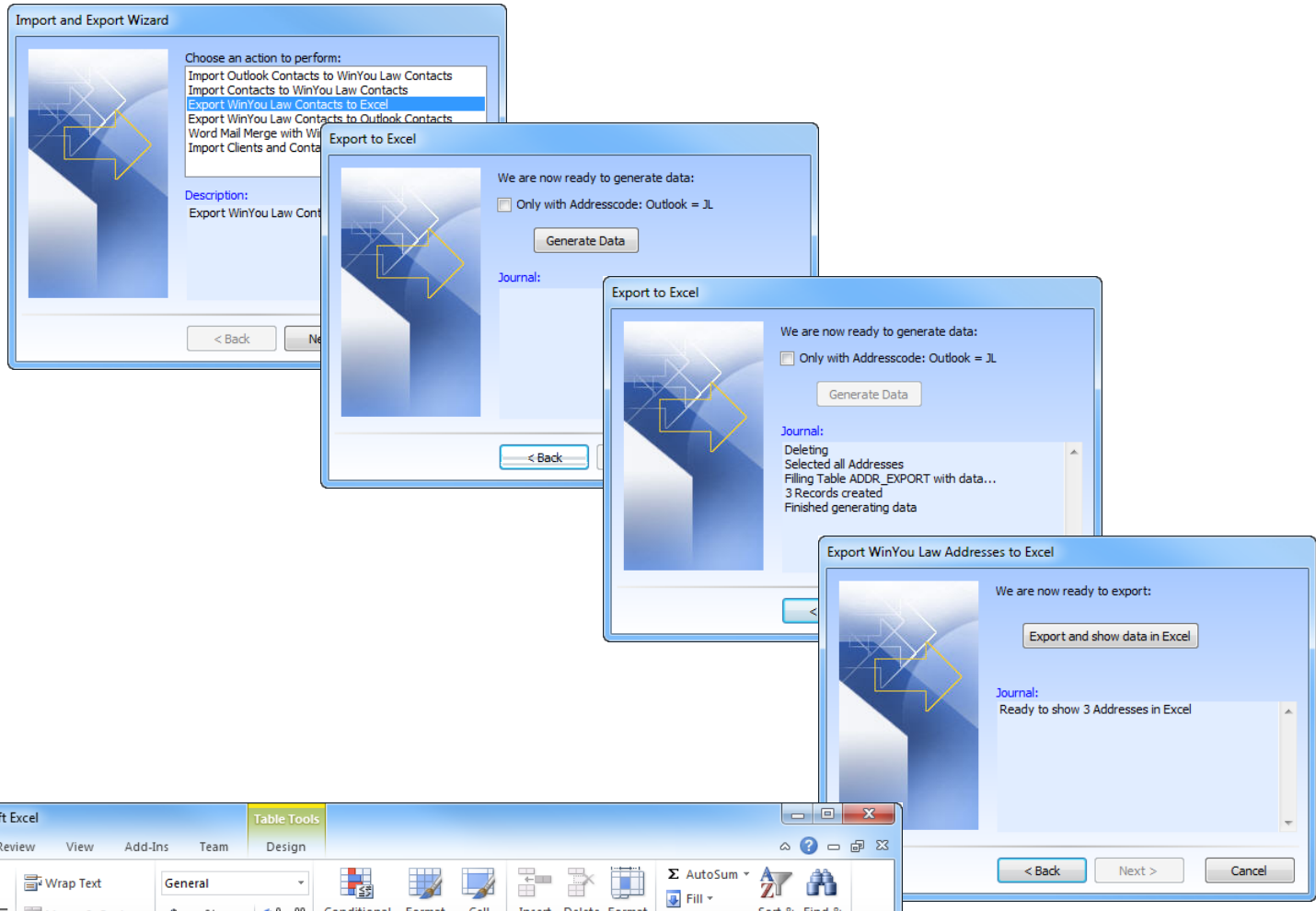


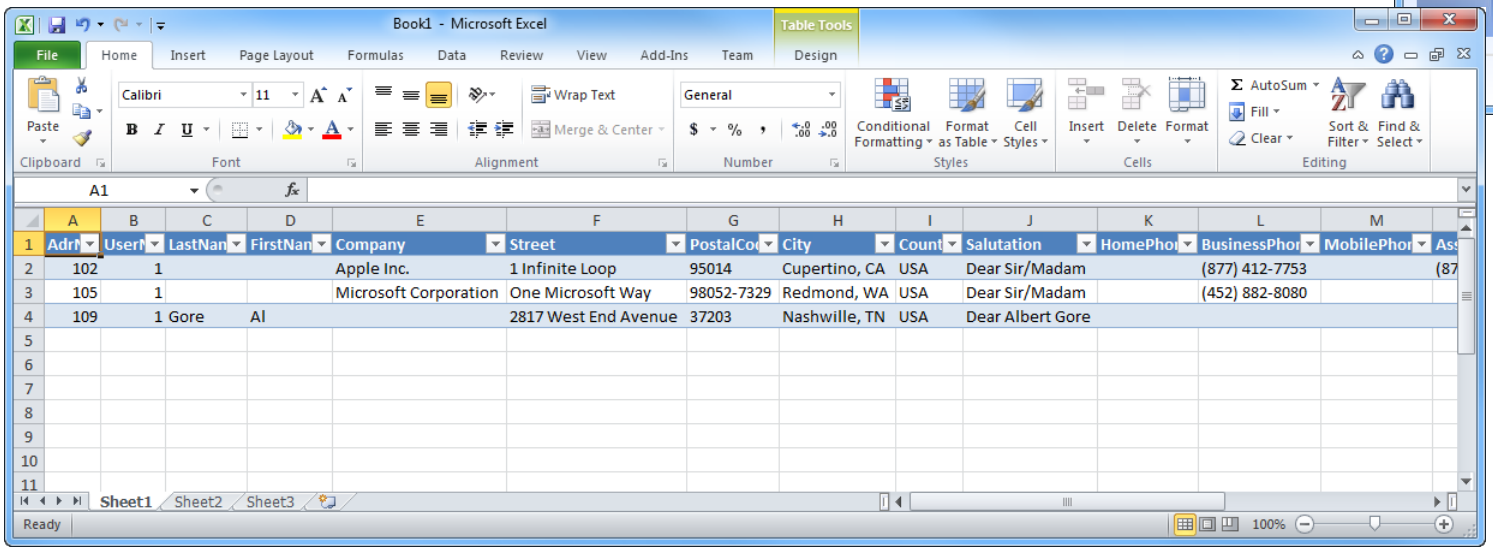


Export YouWinLaw Contacts to Excel

1. Select "Export YouWinLaw Contacts to Excel" and click on "Next"

2. Follow the instructions on screen


Import and Export Wizard
Choose an action to perform:
Import Outlook Contacts to WinYou Law Contacts
Import Contacts to WinYou Law Contacts
Export WinYou Law Contacts to Excel
Export WinYou Law Contacts to Outlook Contacts
Word Mail Merge with Wi
Import Clients and Conta
Description:
Export WinYou Law Cont
< Back
Export to Excel
We are now ready to generate data:
Only with Addresscode: Outlook = JL
Generate Data
Journal:
< Back
Export to Excel
We are now ready to generate data:
Only with Addresscode: Outlook = JL
Generate Data
Journal:
Deleting
Selected all Addresses
Filling Table ADDR_EXPORT with data...
3 Records created
Finished generating data
Export WinYou Law Addresses to Excel
We are now ready to export:
Export and show data in Excel
Journal:
Ready to show 3 Addresses in Excel
< Back
Next >
Cancel



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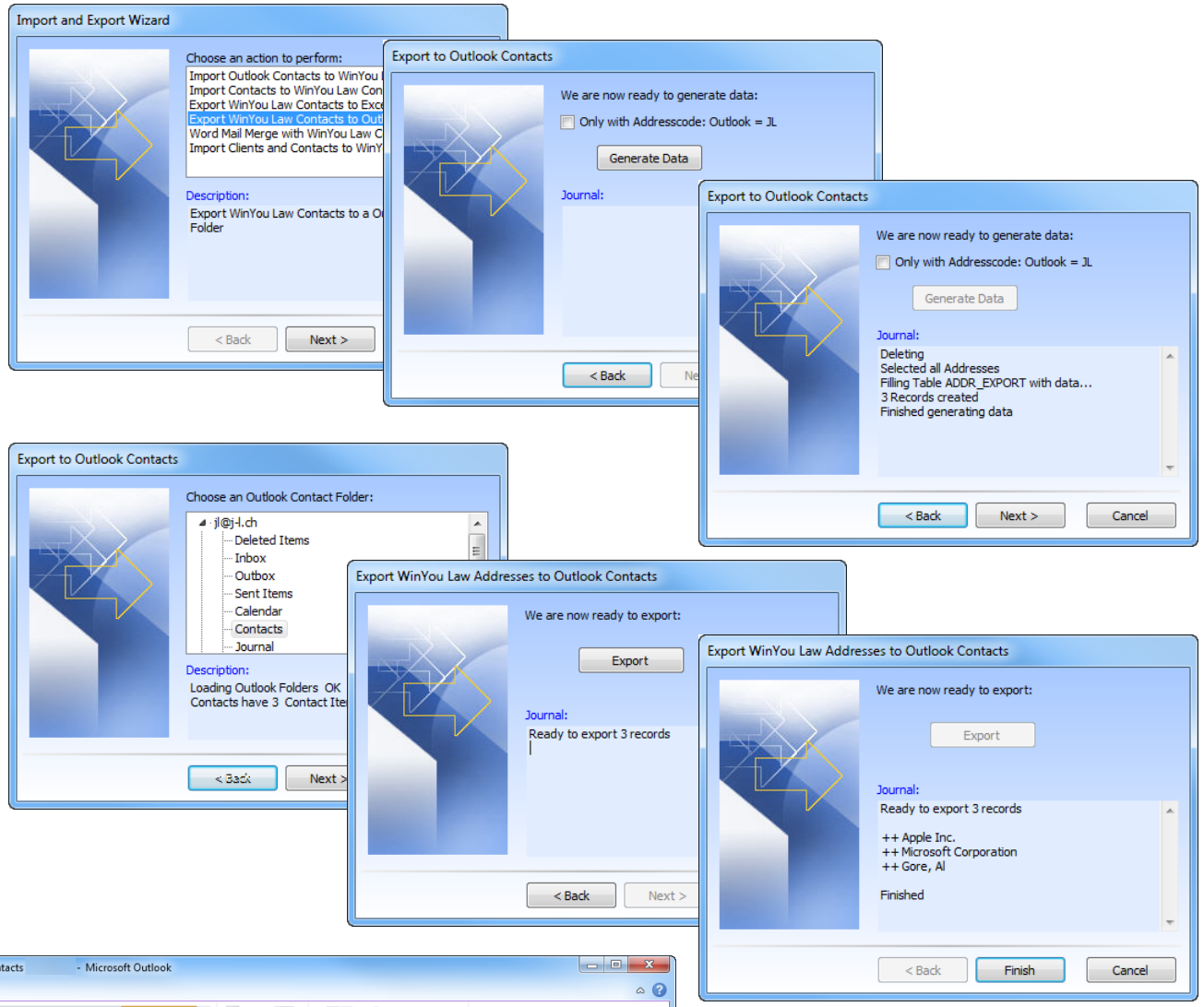
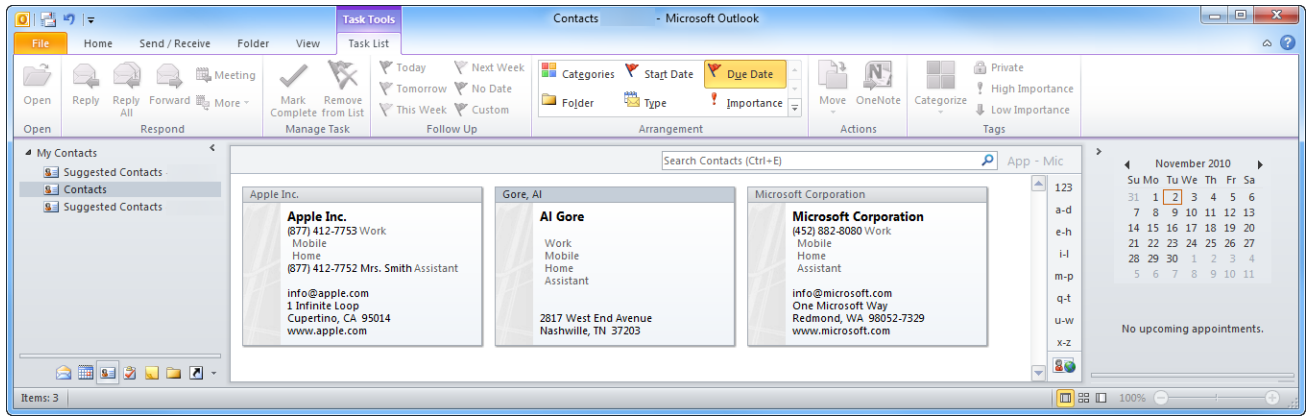
Export YouWinLaw Contacts to Outlook

Just follow the instructions in the dialogs





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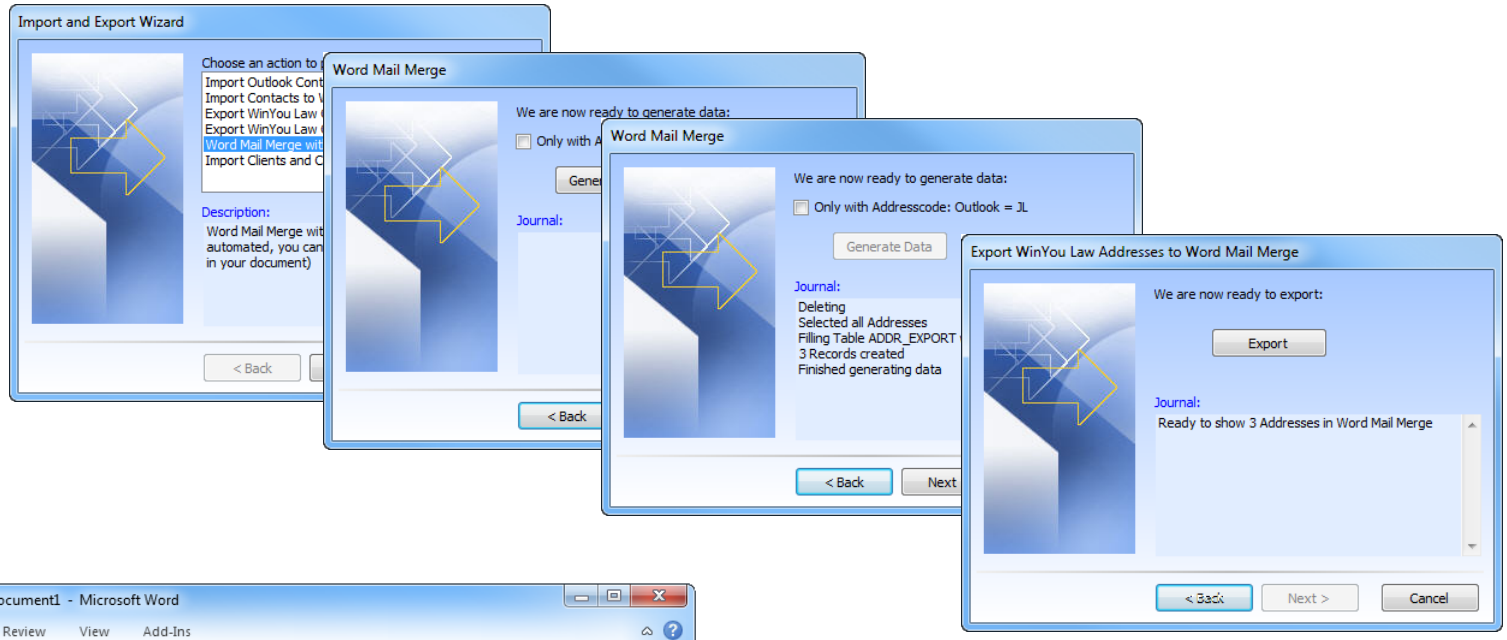
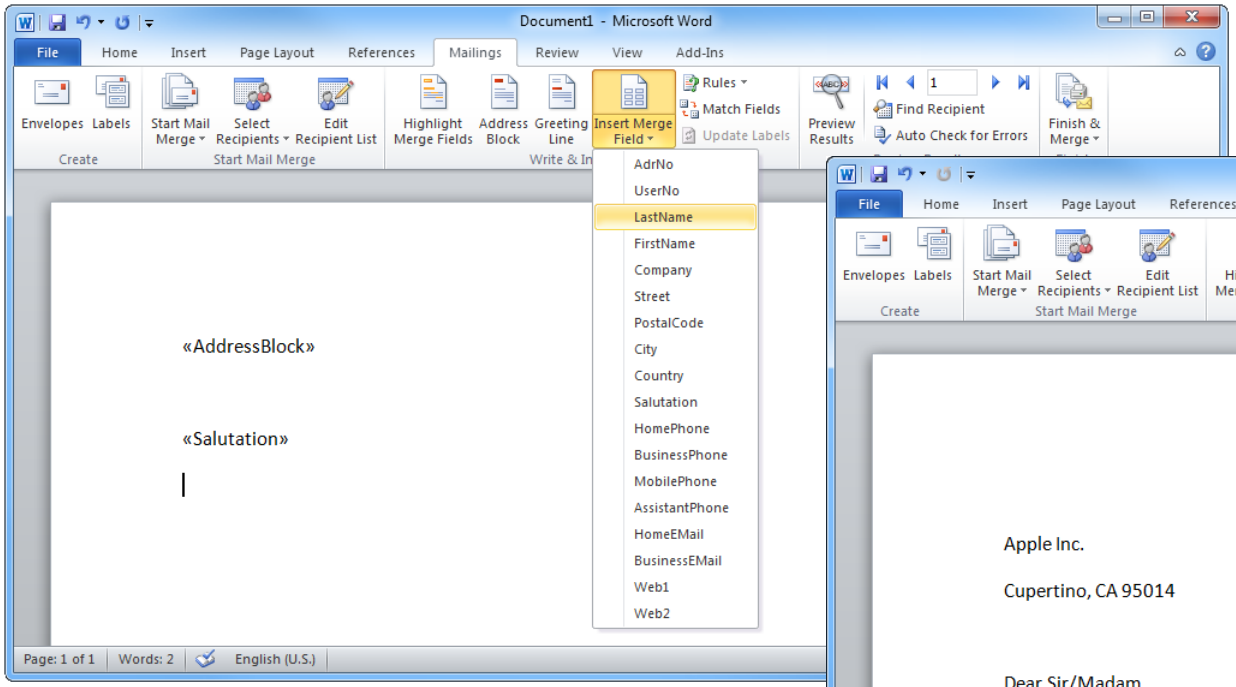
Word Mail Merge with YouWinLaw Contacts

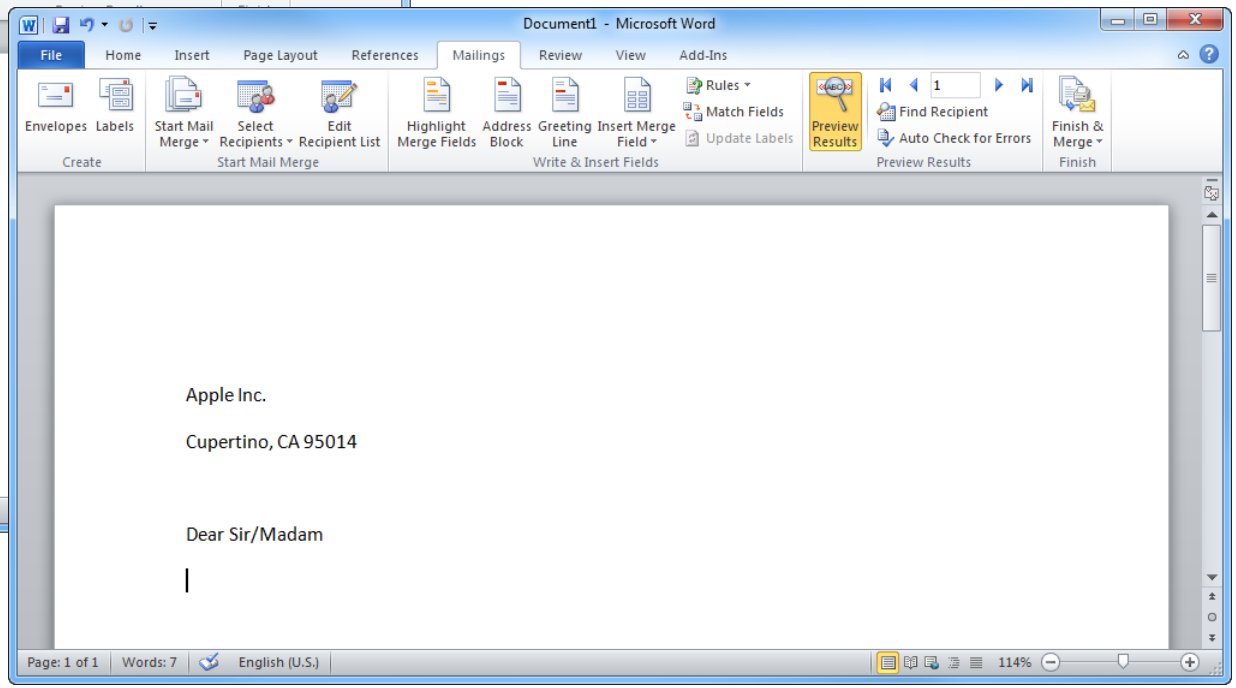
Follow the instructions in the dialogs.

The table with contact data is automatic linked, just start to insert Merge fields.

Also the Address Block is automatically filled!







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